

Bay Area Partnership

Summary of Bay Area workforce
preparation project findings and
recommendations

Steering committee meeting

July 28, 1997

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Agenda

Today's Discussion	Participants	
<ul style="list-style-type: none"> • Executive Summary • Project Overview And Research Methodology • Profiling Of Aid Recipients And Occupational Growth • Barriers To Workforce Re-Entry • Today's Resource Deployment • Moving Forward • Appendix 	<ul style="list-style-type: none"> • Fred Blackwell (SF Foundation) • Jennie Bloebaum (Office Of Supervisor Keith Carson) • Judy Brian (Napa County H&HSA) • Joe Brooks (SF Foundation) • Ted Dientsfrey (N. CA Council For The Community) • Wes Dixon (Private Industry Council) • Jerry Dunn (Sonoma County HSD) • Dianne Edwards (Sonoma County HSD) • Amanda Feinstein (SF Dept. Of Human Services) • Pamela Fyffe (A.T. Kearney) • Rob Gamble (NOVA Private Industry Council) • Emily Gellady (A.T. Kearney) • Evelyn Griggs (EDD, Coastal Division,) • Guileyes Groves (Santa Cruz Human Resources Agency) • Sarah Holliman (A.T. Kearney) • Tia Ingram (Richmond Housing Authority) • Matthew Le Merle (A.T. Kearney) • Emory Lee (U.S. Dept. Of Health And Human Services) • William Lee (SF County) • Liza Llewellyn (A.T. Kearney) 	<ul style="list-style-type: none"> • Brendan Leung (Alameda Social Services Agency) • David Militzer (N. CA Council For The Community) • Anne Moses (San Mateo County Human Services Agency) • Allen Ng (Food And Consumer Service, USDA) • Dan Paicopulos (Marin, Division Of Employment And Training) • Serena Puerta (A.T. Kearney) • John Ritter (Solano County Dept. Of Health And Social Services) • Ed Schoenberger (N. CA Council For The Community) • Vicki Sparks (Solano County Health And Social Services) • Daryl Taramasso (Solano County Health And Social Serives) • Sheri Toy (Solano County Health And Social Services) • Joy Walton (County Administrator's Office) • Sunne Wright McPeak (Bay Area Council) • Ralph Zackheim (Oakland Private Industry Council)

Executive Summary

Executive Summary

The Bay Area workforce preparation project is now nearing the completion of its analysis and is at the point where further progress will be dependent upon each county and the region, as a whole, think through policy implications of this work

- The project team has completed their profiling of aid dependent and unemployed individuals in the ten county Bay Area, and has projected occupational growth by county to determine what employment opportunities will materialize over the next five years
- The team has then analyzed a comprehensive survey in order to understand the barriers inhibiting successful re-entry into the workforce and the skills and motivations of job-seekers. This analysis has led the team to develop a framework for depicting the stages of workforce re-entry and the barriers that must be overcome at each stage
- Finally, the team has assessed today's deployment of resource expenditures, non-cash assistance and training programs in light of the situation at hand and the barriers at each of the stages of workforce re-entry. Our conclusions are that substantial realignment will be required



Each county needs to further explore this analysis and its implications and then work collectively across the Bay Area to make meaningful improvements

Project Overview & Research Methodology

With new welfare legislation placing a strong emphasis on employment, states are being challenged to find creative ways of moving families from welfare to work

■ **Key Elements Of The 1996 Personal Responsibility and Work Opportunity Act**

- The Aid to Families with Dependent Children (AFDC) program is eliminated as an entitlement program
- The former AFDC and JOBS/GAIN programs are replaced by Temporary Assistance for Needy Families (TANF), a fixed amount of money provided by the federal government to individual states in the form of a “block grant”
- Each state is empowered to allocate the block grant largely at its own discretion; federal government restrictions and guidelines are minimal
- To maintain a state’s level of federal funding, 25% of single-parent families and 75% of two-parent families receiving assistance must be involved with work-related activities. These rates climb to 50% and 90%, respectively, by the year 2002
- “Work” is defined as employed or participating in on-the-job training, vocational education, job search or community service
- An individual cannot receive aid for more than 24 consecutive months without working and is limited to five years of federal cash assistance throughout his or her lifetime

**The new federal welfare legislation is focused on
self-sufficiency through employment**

Given that the ten-county Bay Area has a population of 275,017 on aid and unemployment, the need to think through the implications of the new legislation is significant

Average Bay Area Aid And Unemployment Insurance Recipients 1996-97

County	Total Adult Population (16+)	Labor Force ⁽²⁾	Total Aid And Unemployment Recipients ⁽¹⁾	Percentage Of Labor Force	Percentage Of Total Aid And Unemployment Recipients			
					AFDC	General Assistance	Unemployment Insurance	Food Stamps Only
Alameda	1,046,285	690,900	83,569	12.1	37	10	18	35
San Francisco	640,555	407,475	41,344	10.1	26	32	20	22
Solano	271,310	175,583	16,363	9.3	49	4	30	17
Santa Cruz	193,042	142,375	12,177	8.6	28	1	49	22
Contra Costa	682,350	461,600	31,461	6.8	45	7	31	17
Napa	92,745	58,217	3,835	6.6	31	1	36	32
Sonoma	327,445	233,267	14,560	6.2	38	4	31	27
Santa Clara	1,255,895	913,167	53,076	5.8	44	6	28	22
Marin	193,490	132,054	5,231	4.0	25	5	37	33
San Mateo	555,105	381,996	13,400	3.5	28	7	40	25
Bay Area Total	5,248,222	3,596,633	275,017	7.7	37	11	26	26

Notes: (1) State-reported County Social Services data, County Social Services data, E.D.D. UI Claims Activities Report

(2) LMID average for fiscal 1996-1997; June 1997 estimated by averaging of two prior months

Source: A.T. Kearney analysis

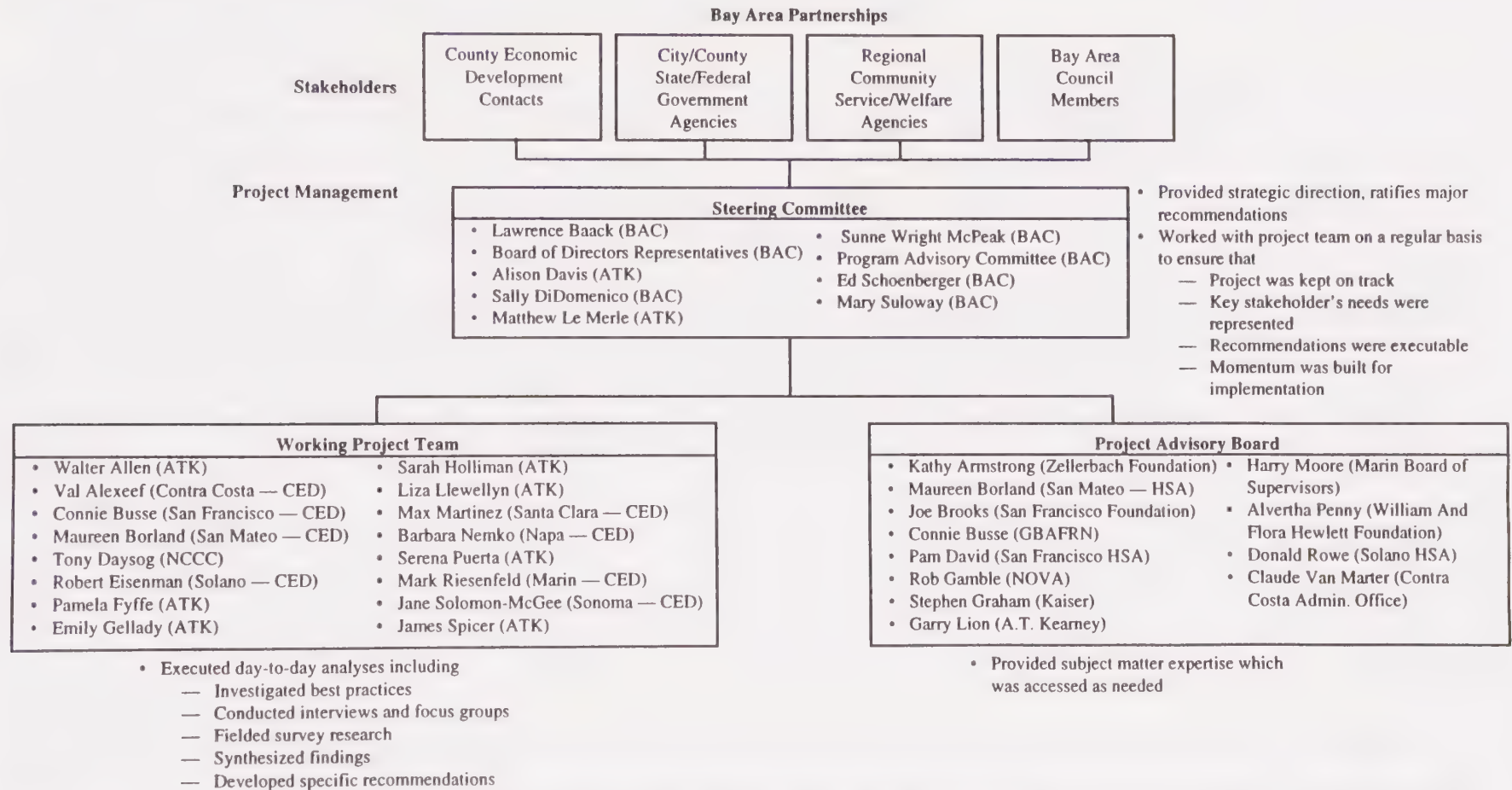
However, there is widespread agreement that a number of critical issues have not been consistently explored across all ten counties

Critical Issues

- Who are the recipients of aid and unemployment and how should they best be profiled?
- What job growth is likely to occur over the next five years in each county and occupation type?
- What barriers do aid and unemployment recipients face as they attempt to reenter the workforce and achieve self-sufficiency?
- What skills does the employable welfare population possess and how do these match against occupational growth projections?
- What is the pattern of resource deployment given the answers to the questions above?
 - Resource expenditures
 - Non-cash assistance
 - Training programs
- As a result, what is the challenge confronting the counties and the Bay Area as a whole?

In response to this emerging welfare-to-work environment, the Bay Area Partnership established the Workforce Preparation Team to examine each issue at a regional and county level

Workforce Preparation Team



Notes: ATK — A.T. Kearney, BAC — Bay Area Council Liasons, CED — County Economic Development Contacts, NCCC — Northern California Council for the Community, HSA — Human Services Agency, GBAFRN — Greater Bay Area Family Resource Network

To resolve each critical issue, several complex analytical activities were conducted simultaneously with discrete deliverables in mind

Critical Issues

- Who are the recipients of aid and unemployment and how should they be best prefiled?
- What job growth is likely to occur over the next five years in each county and occupation type?
- What barriers do aid and unemployment recipients face as they attempt to reenter the workforce and achieve self-sufficiency?
- What skills does the employable welfare population possess and how do these match against occupational growth projections?
- What is the pattern of resource deployment given the answers to the questions above, i.e., resource expenditures, non-cash assistance, training programs?
- As a result, what is the challenge confronting the counties and the Bay Area as a whole?

Key Analytical Activities

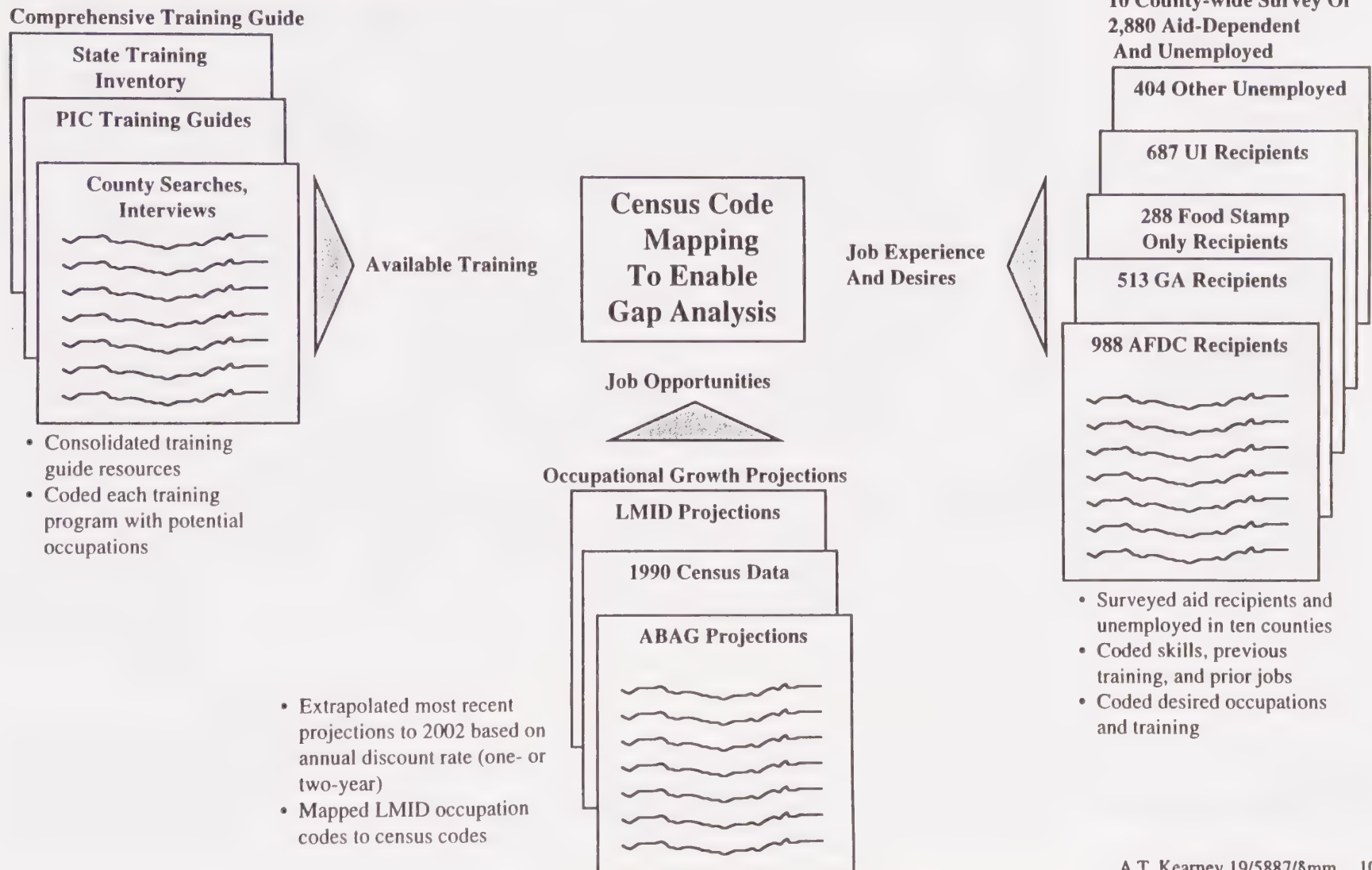
- Survey of 2,880 unemployed and aid-dependent individuals
- Budgetary analysis of dollars allocated for cash-aid, self-sufficiency dollars, and enabling support services
- Analysis of occupational growth by region and county
- Assessment of training programs in each county
- Benchmark of local and national best practices
- Qualitative interviews with various county constituencies
- Analysis of county and other aid and unemployment recipient databases

End Products

- Demographic profile of each type of aid and unemployment recipient classification by category
- Five-year occupational growth projections in absolute numbers and percentages
- Fact-based analysis of
 - Barriers to employment
 - Skill sets of unemployed
 - Desired occupations
- Understanding of dollars allocated at a state and county level versus the barriers to employment
- Comprehensive regional training guide

One important benefit of this work is a more complete set of county level databases than was previously available to support welfare issue analysis and policy setting


Integrated Research Methodology




Profiling of Aid Recipients & Occupational Growth

Central to any assessment of welfare-to-work is a detailed and thoughtful profiling of both recipients of aid and unemployment as well as the prospects for occupational growth

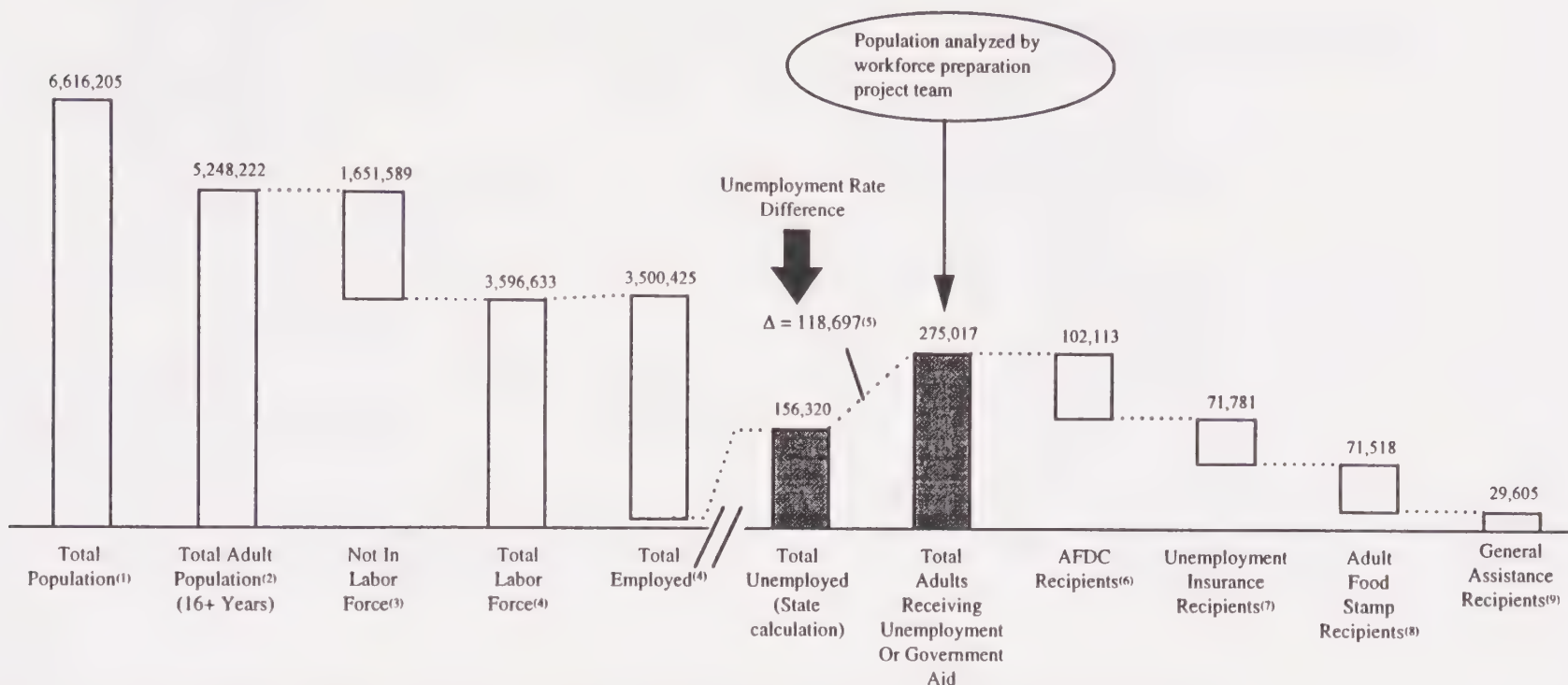
In-Depth Profiling

Aid And Unemployment Recipients
<ul style="list-style-type: none">• Aid to Families With Dependent Children (AFDC)• General Assistance (GA)• Food Stamps (FS)• Unemployment Insurance (UI)• Other Unemployed 
<ul style="list-style-type: none">• General characteristics/statistics<ul style="list-style-type: none">— Size of population by county— Current value of aid payments made— Demographics— Behavioral/lifestyle• Voice of the recipient<ul style="list-style-type: none">— Historical aid usage pattern— Current situation— Aspirations/interests— Skills developed/education— Workforce reentry difficulties— Chief skill deficiencies— Opinions about current county services— General attitudes towards working/lifestyle

Occupational Growth
<ul style="list-style-type: none">• Occupational Employment Statistics (OES) codes of jobs by county (700 classifications)<ul style="list-style-type: none">— Current number— Projections (1997-2002)• Major employers by county 
<ul style="list-style-type: none">• Prerequisite skills/education by occupation<ul style="list-style-type: none">— Low level— High level• Top 25 growth occupations• Industry mix by county• Gaps by county<ul style="list-style-type: none">— County absorption rates— Desired jobs versus available jobs

The team has profiled the 275,017 adults in the Bay Area currently receiving unemployment or government aid

Bay Area Summary 1996-97

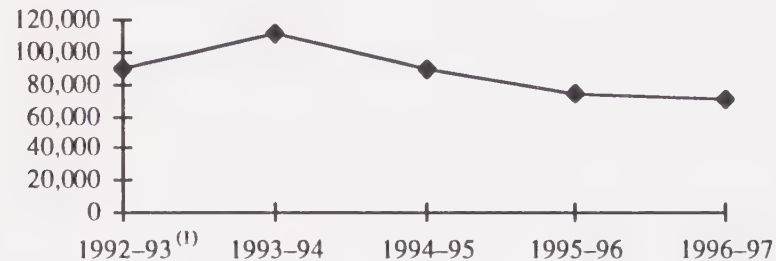


- Notes:
- (1) Sum of population estimates for ten Bay Area counties including: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, and Sonoma
 - (2) Estimate assumes the same ratio to population as in the 1990 U.S. Census Bureau report
 - (3) Total adult population less the total labor force
 - (4) LMID averages for Fiscal 1996-97; June 1997 estimated by average of two prior months
 - (5) The difference between total unemployed and total reported unemployed or receiving government aid. Included are those unemployed not receiving government aid (new entrant, re-entrants, self-employed, etc.), those not actively looking for employment, and those employed and receiving government aid
 - (6) State reported County Social Services data for Fiscal 1996-97; County Social Services data; A.T. Kearney analysis
 - (7) E.D.D. UI Claims Activities for Fiscal 1996-97; Estimated by Intrastate Weeks Claimed divided by number of weeks in month
 - (8) Total unemployed as a percentage of total labor force
 - (9) Total adults receiving unemployment or aid as a percent of total labor force

Source: State reported County Social Services data; County Social Services data; E.D.D.; U.I. Claims Activities report; A.T. Kearney analysis

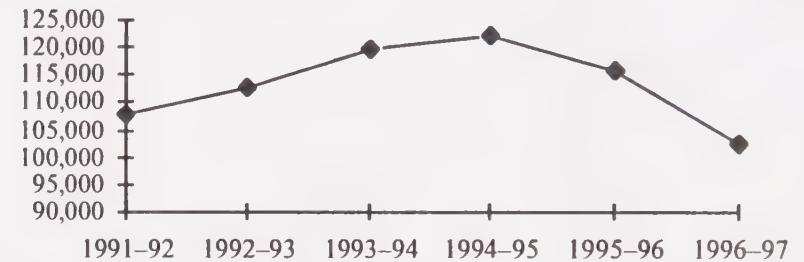
An examination of current trends by aid type indicates that most counties are on their way to reducing assistance rolls

Average Unemployment Insurance Recipients⁽¹⁾



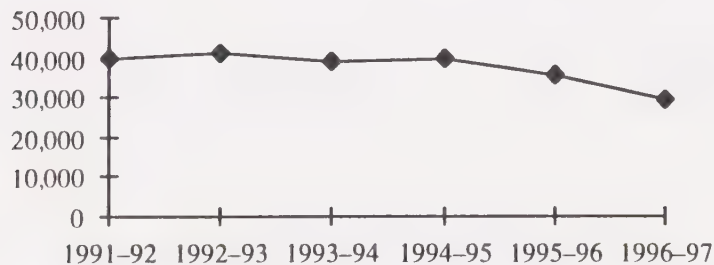
Overall, unemployment insurance recipients have decreased over the last five years due to an improving local economy, though we saw a slight increase this past year...

Average AFDC Recipients



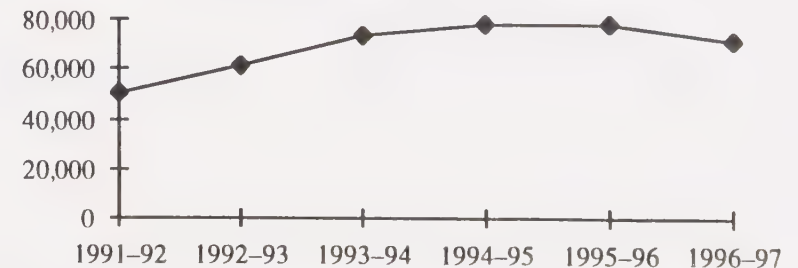
And AFDC recipients grew steadily over time in the early 1990s, but have declined recently with welfare reform and the help of programs like GAIN...

Average General Assistance Recipients



While the number of GA recipients has fluctuated but recently declined primarily due to roll cutting...

Average Food Stamp Recipients



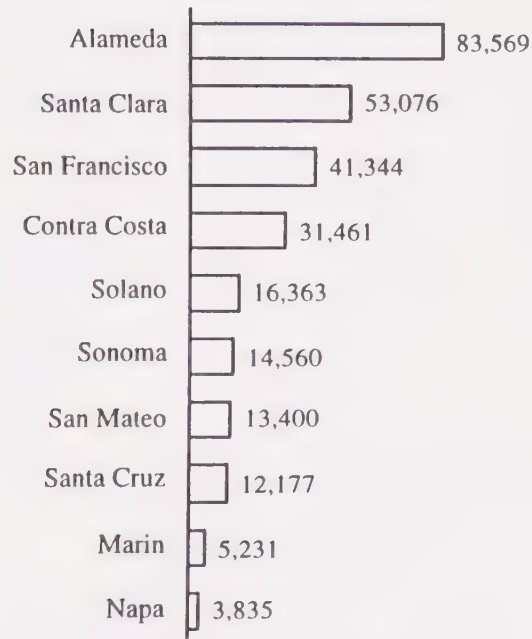
And though there has been a recent drop in food stamp recipients, over time the number of recipients has increased, indicating that people are working in non-living wage jobs

Note: (1) Data was not consistently captured by state prior to 1992

Source: State-reported County Social Services data, County Social Services data, E.D.D. UI Claims Activities Report; A.T. Kearney analysis

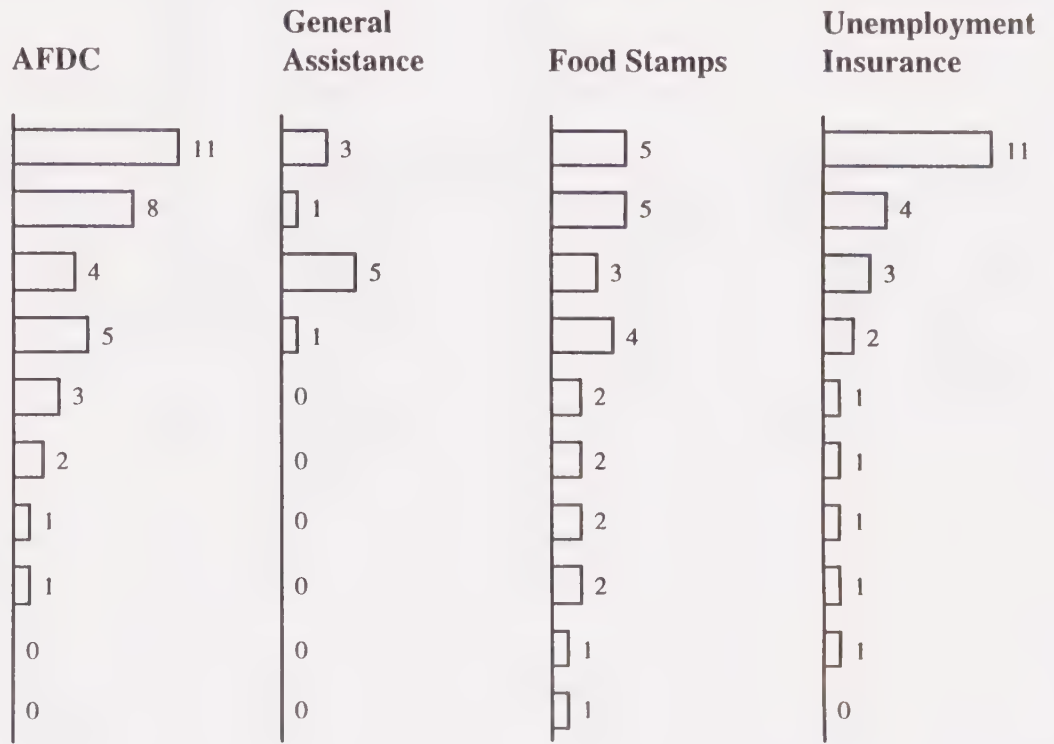
Not surprisingly, a breakdown of total Bay Area aid and unemployment recipients by county shows that Alameda, San Francisco, and Santa Clara account for 65% of aid recipients present in the ten county region. However, for specific aid types, slight differences exist for AFDC, General Assistance, and Food Stamp recipients by county (i.e., Contra Costa)

**Total Number Of Aid And
Unemployment Recipients
(% Of Total)**



Bay Area Total 275,017 = 100%

**Total By Aid Type By County
(%)**



 Top Three County Levels

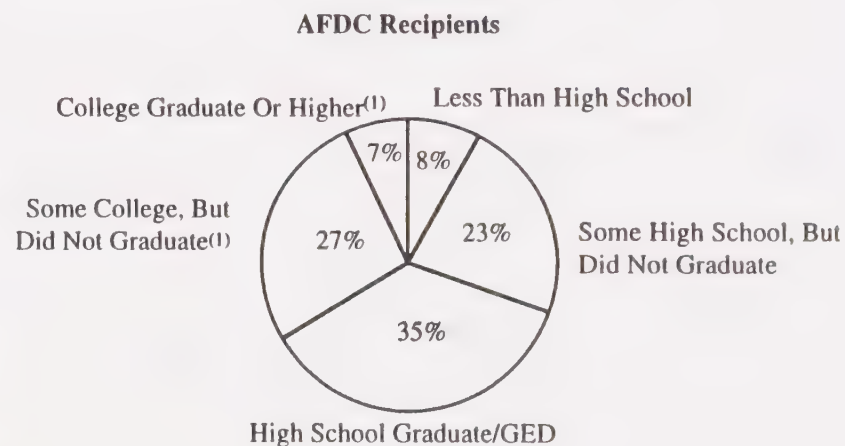
In the Bay Area, an overwhelming number of aid recipients are served through AFDC (102,113). Through our survey we found these recipients to be most typically single ethnic mothers with a high school education in their prime earning years staying at home to raise their child(ren)

 Highest Percentage Of Respondents

Basic Demographics — AFDC Recipient

		AFDC n = 988 (%)
Gender	Male	9
	Female	91
Age	<25	23
	25–39	60
	>40	17
Ethnicity	Caucasian	32
	African-American	37
	Hispanic	20
	Other	11
Marital Status	Never Married	48
	Divorced	20
	Married	17
	Separated	13
	Widowed	2

Education Level



- 93% have children living in their home full time
- 67% have 1–2 children

Note: (1) The number of respondents indicating “some college” and “post-graduate” may be higher than real figures due to respondent misunderstanding of terminology

Source: Workforce Preparation Survey; A.T. Kearney analysis

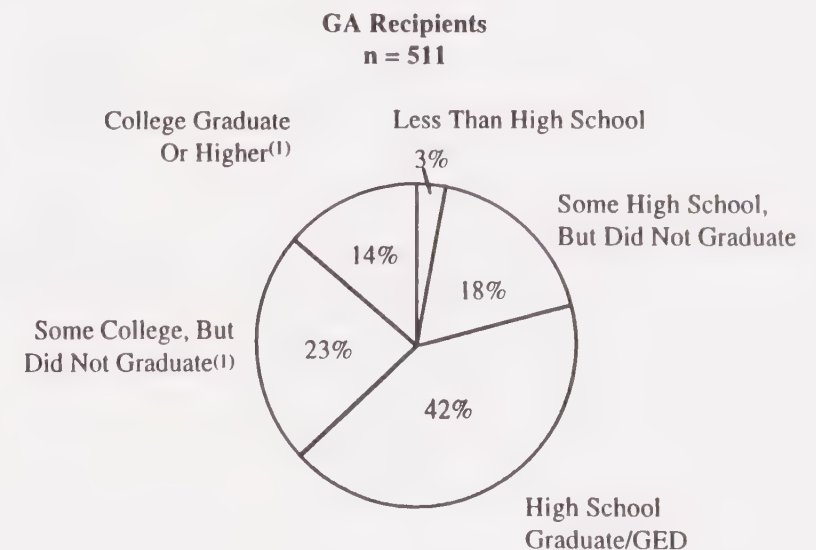
The smallest size category (29,605) of aid recipients are obtaining General Assistance and these individuals tend to be middle aged, unmarried black men with at least a high school degree

 Highest Percentage Of Respondents

Basic Demographics — General Assistance Recipient

		GA (%)
Gender	Male	54
	Female	46
Age	<25	7
	25–39	44
	>40	49
Ethnicity	Caucasian	35
	African-American	43
	Hispanic	9
	Other	13
Marital Status	Never Married	50
	Divorced	27
	Married	7
	Separated	14
	Widowed	2

Education Level



85% do not have children living in their home full-time

Note: (1) The number of respondents indicating “some college” and “post-graduate” may be higher than real figures due to respondent misunderstanding of terminology

Source: Workforce Preparation Survey; A.T. Kearney analysis

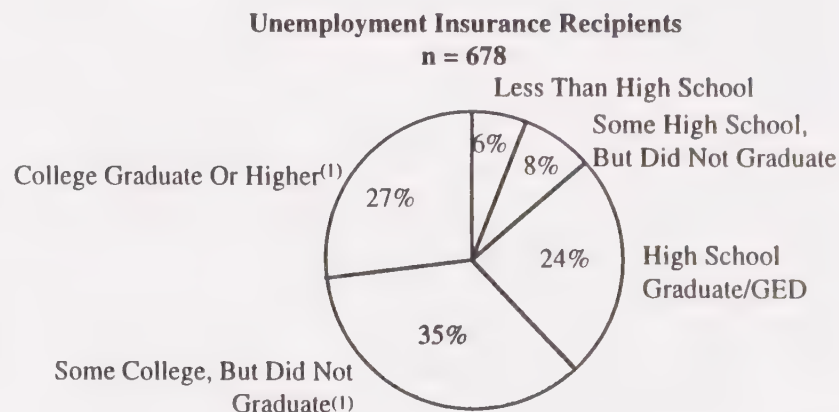
Given the trend in company downsizing and use of temporary/seasonal workers, the second largest component of aid types are those receiving Unemployment Insurance. These individuals tend to be white, older, well educated, and either childless or with grown children

 Highest Percentage Of Respondents

Basic Demographics — UI Recipient

		Unemployment Insurance n = 687 (%)
Gender	• Male	53
	• Female	47
Age	• <25	9
	• 25–39	37
	• >40	54
Ethnicity	• Caucasian	49
	• African-American	15
	• Hispanic	19
	• Other	17
Marital Status	• Never Married	35
	• Divorced	21
	• Married	34
	• Separated	7
	• Widowed	3

Education Level



65% do not have children living in their home full-time

Note: (1) The number of respondents indicating "some college" and "post-graduate" may be higher than real figures due to respondent misunderstanding of terminology

Source: Workforce Preparation Survey; A.T. Kearney analysis

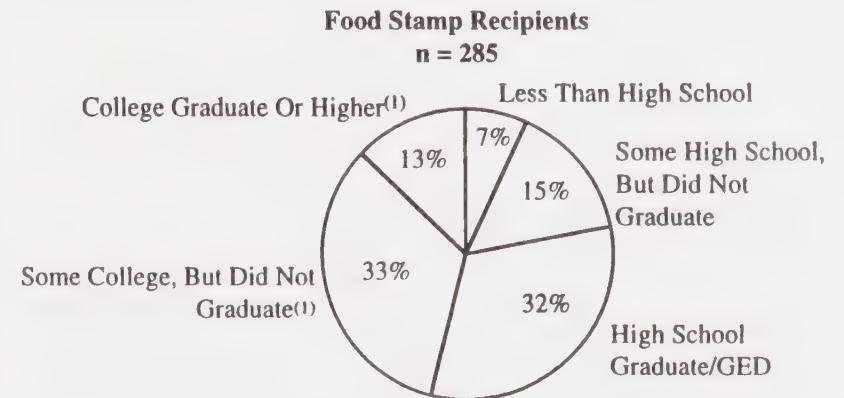
Large numbers of Bay Area aid recipients (71,518) use Food Stamp programs to help alleviate hunger and malnutrition. Typically, these recipients are in a life event transition period (e.g., recently divorced) or are working in low paying occupations. They tend to be single white women trying to make ends meet

☐ Majority

Basic Demographics — Food Stamp Recipient

		Food Stamps n = 288 (%)
Gender	• Male	44
	• Female	56
Age	• <25	12
	• 25–39	48
	• >40	40
Ethnicity	• Caucasian	51
	• African-American	24
	• Hispanic	14
	• Other	11
Marital Status	• Never Married	42
	• Divorced	28
	• Married	16
	• Separated	12
	• Widowed	2

Education Level



59% do not have children living in their home full-time

Note: (1) The number of respondents indicating “some college” and “post-graduate” may be higher than real figures due to respondent misunderstanding of terminology

Source: Workforce Preparation Survey; A.T. Kearney analysis

As expected, the majority of aid recipients are currently unemployed. Surprisingly, however, a large percentage of AFDC and GA recipients have had jobs in the past year disproving a common perception

Recent Paid Job History (%)

☐ Highest Percentage Of Respondents

Type of Recipient	Aid Assistance Duration	San Francisco Bay Area	Alameda	San Francisco	Santa Clara	Contra Costa	Solano	Sonoma	San Mateo	Santa Cruz	Marin	Napa
AFDC	• Currently working											
	— Yes	17	9	14	9	19	24	15	22	25	19	18
	— No	83	91	89	91	81	76	85	78	75	81	82
	• Last had job											
	— < 1 year ago	44	38	54	47	38	39	37	49	56	45	49
	— 1-2 years ago	15	15	9	20	15	16	24	10	9	14	13
	— 3 or more years ago	33	32	34	31	32	32	38	29	31	39	30
	— Never	8	15	3	3	15	13	1	12	4	2	8
Food Stamps ⁽¹⁾	• Currently working											
	— Yes	29	17	25	0	19	27	17	20	26	22	25
	— No	80	83	75	100	81	73	83	80	74	78	75
	• Last had job											
	— < 1 year ago	90	48	46	27	48	41	93	34	54	48	64
	— 1-2 years ago	7	22	27	27	13	9	6	50	14	16	28
	— 3 or more years ago	2	26	18	36	35	50	1	8	32	36	11
	— Never	1	4	9	9	4	0	0	8	0	0	0
General Assistance	• Currently working											
	— Yes	5	3	9	8	4	5	2	4	0	9	0
	— No	95	97	91	92	96	95	98	96	100	91	100
	• Last had job											
	— < 1 year ago	40	46	38	60	25	35	27	51	27	53	45
	— 1-2 years ago	19	17	17	12	23	19	28	10	32	14	11
	— 3 or more years ago	37	35	40	26	38	43	45	33	38	33	44
	— Never	4	2	5	2	15	3	0	6	3	0	0
Unemployment Insurance	• Currently working											
	— Yes	12	8	11	6	12	5	17	14	6	17	19
	— No	88	92	91	94	88	95	83	86	94	83	81
	• Last had job											
	— < 1 year ago	45	93	88	88	91	93	93	94	89	89	86
	— 1-2 years ago	22	5	7	10	6	4	6	6	11	4	12
	— 3 or more years ago	29	2	5	2	0	3	1	0	0	2	0
	— Never	4	0	0	0	3	0	0	0	0	2	2
Total Number Of Recipients		275,017	83,569	41,344	53,076	31,461	16,363	14,560	13,400	12,177	5,231	3,835

Note: (1) Excludes "other unemployed" respondents
Source: Workforce Preparation survey; A.T. Kearney analysis

The length of time the majority of recipients have been on some form of aid varies by aid type and county. In particular, AFDC recipients vary more significantly between the counties

Length Of Time On Aid By Recipient Type (%)


 Highest Percent Of Respondents

Type of Recipient	Aid Assistance Duration	San Francisco Bay Area	Alameda	San Francisco	Santa Clara	Contra Costa	Solano	Sonoma	San Mateo	Santa Cruz	Marin	Napa
AFDC	• Less than one year	34	27	29	33	32	29	39	44	33	42	38
	• 1-5 years	37	34	36	38	37	38	40	28	34	34	53
	• Greater than 5 years	29	39	35	29	31	33	21	28	33	24	9
Food Stamps	• Less than one year	65	52	73	60	72	61	61	93	63	58	70
	• 1-5 years	24	22	27	20	24	17	30	7	26	28	26
	• Greater than 5 years	11	26	0	20	4	22	9	0	11	14	4
General Assistance	• Less than one year	68	70	60	83	67	78	64	75	67	79	56
	• 1-5 years	23	19	29	12	22	13	34	15	18	17	33
	• Greater than 5 years	9	11	11	5	11	9	2	10	15	4	11
Unemployment Insurance ⁽¹⁾	• Less than one year	100	100	100	100	100	100	100	100	100	100	100
	• 1-5 years	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	• Greater than 5 years	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Total Number Of Recipients		275,017	83,569	41,344	53,076	31,461	16,363	14,560	13,400	12,177	5,231	3,835

Note: (1) Maximum time allowed on unemployment insurance is six months per claim
Sources: Workforce Preparation survey; A.T. Kearney analysis

Of all types of aid recipients, those on AFDC are more likely to have come from households in which parents or other household members also received aid assistance. This cycle of poverty is especially apparent in Alameda, San Francisco, Contra Costa, Solano and Napa counties

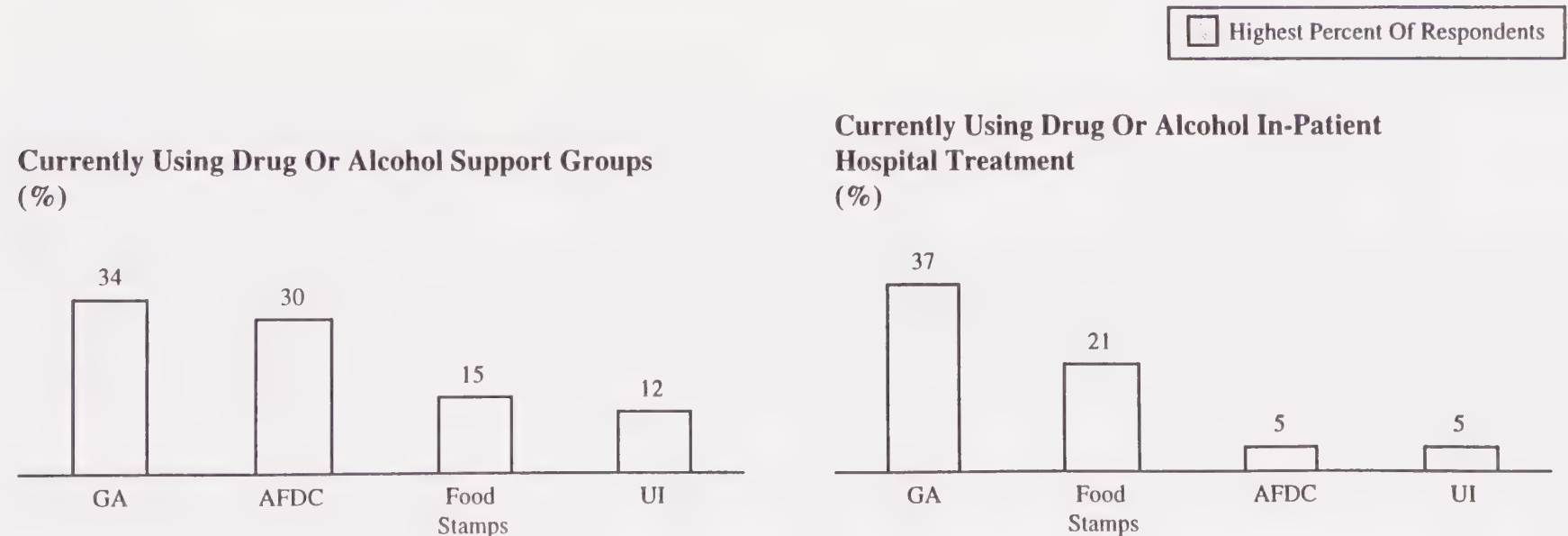
Percentage Of Aid Recipients Who Grew Up With Aid Assistance (%)

 Highest Percent Of Respondents

Type Of Recipient	San Francisco Bay Area	Alameda	San Francisco	Santa Clara	Contra Costa	Solano	Sonoma	San Mateo	Santa Cruz	Marin	Napa
AFDC	34	41	41	24	36	44	32	29	21	25	42
Food Stamps	26	34	31	36	16	31	30	27	14	10	44
General Assistance	23	20	29	28	29	23	12	17	18	13	11
Unemployment Insurance	17	23	26	17	28	19	21	18	20	12	10
Total Number Of Recipients	275,017	83,569	41,344	53,076	31,461	16,363	14,560	13,400	12,177	5,231	3,835

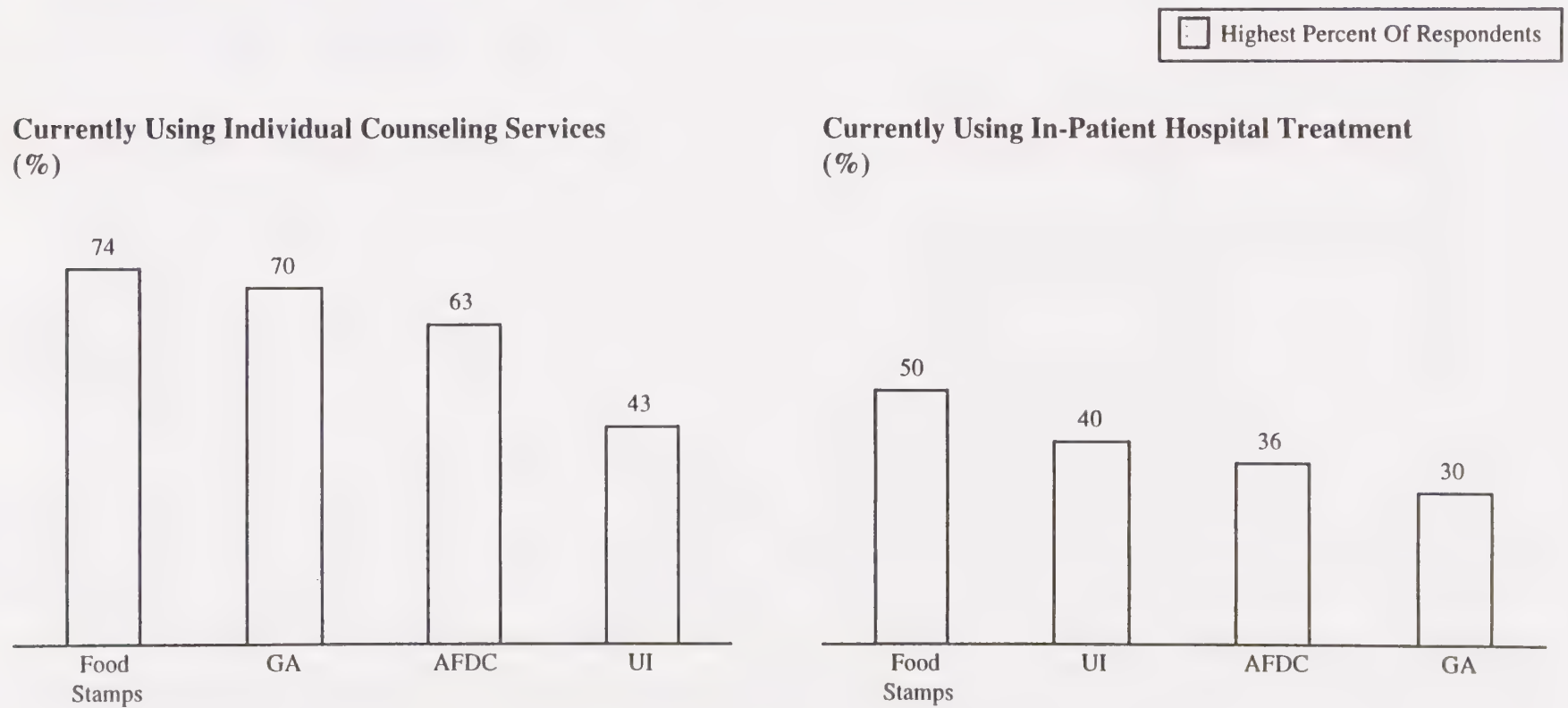
In addition to logistical hurdles such as transportation, substance abuse is a major impediment to employment for General Assistance and AFDC recipients. General Assistance recipients are most likely to be currently enrolled in hospital treatment programs for chronic conditions

Existing Prevalence Of Substance Abuse Among Aid Types



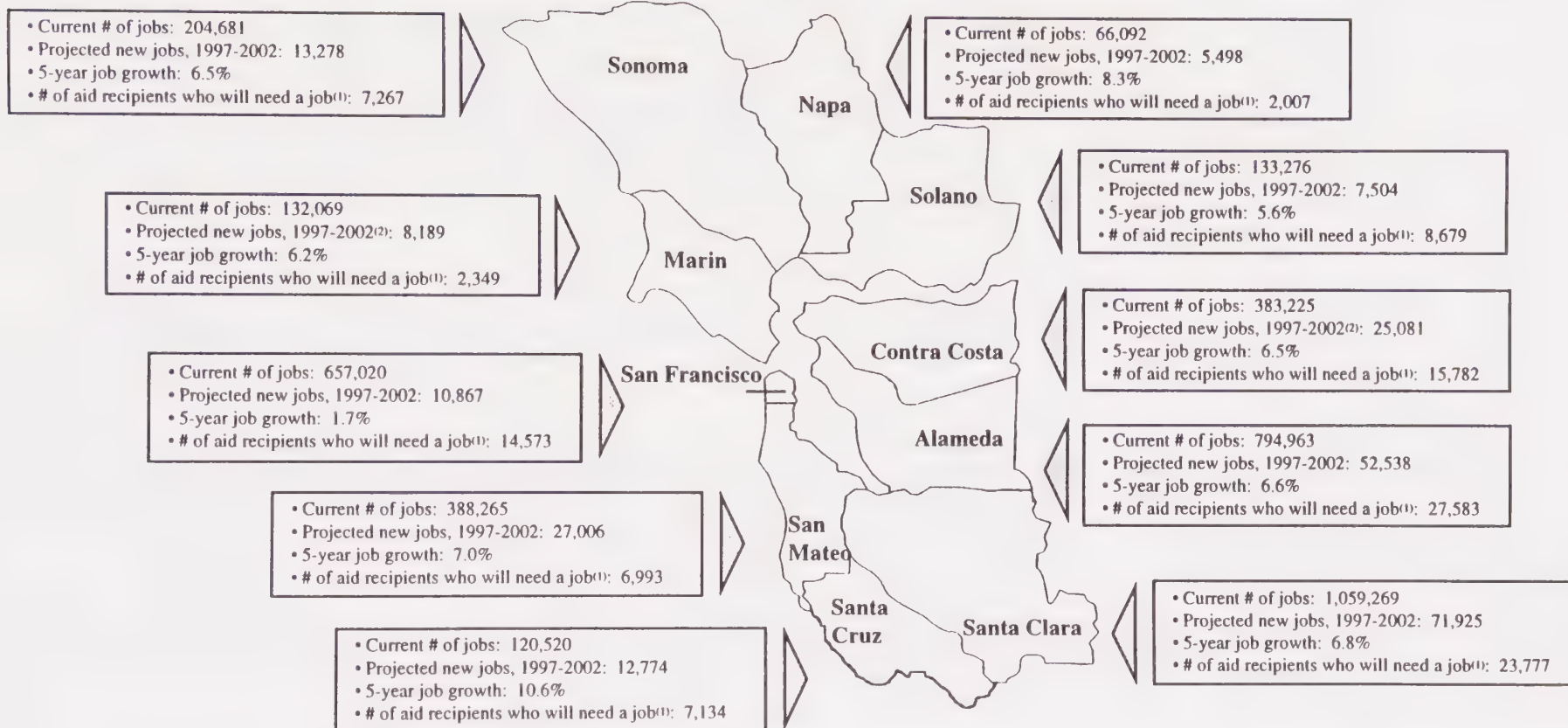
Our findings also show that a large percentage of Food Stamp recipients have utilized counseling or mental health service programs

Percentage Of Aid Recipients Who Are Using Counseling/Mental Health Services



According to the current occupational growth projections, Bay Area job growth over the next five years is expected to stay fairly strong (6%) in all counties except San Francisco

County-Based Occupational Growth Projections



Total number of current Bay Area jobs: 3,939,380
Total number of projected Bay Area jobs, 1997-2002: 234,660
Projected overall average growth rate for the Bay Area, 1997-2002: 6.0%

Notes: (1) Includes percentages of AFDC, GA, and Unemployment Insurance recipients; excludes Food Stamps recipients who are unemployed (non-quantified)

(2) Contra Costa and Marin counties are based on preliminary projections

Source: Employment Development Department LMID; discounted annualized estimate based on projections from 1994-2001; A.T. Kearney analysis



At the same time, 16 of the top 25 growth occupations are appropriate for those with a high school degree or less

Bay Area Job Growth Projections (1997–2002)

☐ Achievable By Those With High School Degree Or Less

Top 25 Growth Occupations, 1997–2002	1997 Jobs	New Jobs 1997–2002	Total Growth (%)
Computer Systems Analysts And Scientists	45,706	18,808	41.2
Managers, Administrators, And Related Occupations	125,262	14,419	11.5
Executives, Administrators, And Officials Public Administration	114,351	7,875	6.9
Cashiers	63,617	5,629	8.8
Waiters And Waitresses	50,670	5,615	11.1
Sales Representatives: Mining, Manufacturing, And Wholesale	52,687	5,552	10.5
Machine Feeders And Offbearers, Production Helpers, Other Laborers	98,459	5,532	5.6
Sales Workers: Apparel And Shoes	204,132	5,438	2.7
Engineers: Electrical And Electronic	30,226	4,989	16.5
Janitors And Cleaners	53,446	4,906	9.2
Truck Drivers	49,830	4,438	8.9
Receptionists	34,114	4,348	12.7
Secretaries	83,416	4,263	5.1
Guards, Police, Protective Occupations Except Public Service	29,892	4,229	14.1
Computer Programmers	25,135	4,062	16.2
Kitchen Workers And Miscellaneous Food Preparation Occupations	100,203	3,741	3.7
Teachers' Aides	36,284	3,597	9.9
General Office Clerks	92,508	2,957	3.2
Sales Support Occupations	21,631	2,888	13.3
Accountants And Auditors	35,028	2,773	7.9
Cooks	39,700	2,753	6.9
Machinery Maintenance Occupations	34,159	2,724	8.0
Financial Managers	27,641	2,670	9.7
Health Aides Except Nursing	12,580	2,494	19.8
Teachers, Elementary School	35,541	2,452	6.9
All Other	2,443,192	105,508	4.3
Total	3,939,380	234,660	6.0

Source: Employment Development Department LMID; discounted annualized estimate based on projections from 1994–2001;
A.T. Kearney analysis

Because of the unique local economy profile of each county, there are important county differences in the top 25 occupation growth projections

Differences In Specific County Occupation Growth Projections From The Overall Bay Area Region Projections (1997–2002)

☐ Achievable By Those With High School Degree Or Less

County	Top 25 Occupations "In Addition" To Regional List	Top 25 Occupations "Excluded From" The Regional List
Alameda	<ul style="list-style-type: none"> • Assemblers • Teachers, secondary school • Police, detectives, bailiffs, and other law enforcement public service 	<ul style="list-style-type: none"> • Computer Programmer • Health aides except nursing • Teachers, elementary school
Contra Costa	<ul style="list-style-type: none"> • Teachers, secondary school • Physical education teachers • Sales, counter clerks • Registered nurses • Attendants at amusement and recreation facilities • Stock and material handlers and baggers 	<ul style="list-style-type: none"> • Engineers: electrical and electronic • Computer Programmer • Accountants and auditors • Financial managers • Health aides except nursing • Teachers, elementary school
Marin	<ul style="list-style-type: none"> • Sales counter clerks • Sales workers, furniture, appliance, and building suppliers • Miscellaneous precisionworkers: metal, wood • Correctional institution officers • Hairdressers, barbers, and cosmetologists 	<ul style="list-style-type: none"> • Engineers: electrical and electronic • Janitors and cleaners • Guards, police, protective occupations except public services • Financial managers • Teachers, elementary school
Napa	<ul style="list-style-type: none"> • Stock and material handlers, and baggers • Sales workers, furniture, appliance, and building suppliers • Occupations not classified • Hand packers and packagers • Separating, filtering, and clarifying machine operators • Packaging and filling machine operators • Managers, medicine and health • Farmers and farm workers except horticultural 	<ul style="list-style-type: none"> • Computer systems analysts and scientists • Engineers: electrical and electronic • Guards, Police, Protective occupations except public services • Teachers' aides • Sales support services • Accountants and auditors • Financial managers • Health aids except nursing
San Francisco	<ul style="list-style-type: none"> • Securities and Financial Services Sales Occupations • Investigators and Adjusters Except Insurance • Managers Food Serving and Lodging Establishments • Managers Marketing Advertising and Public Relations • Miscellaneous Hand Working Production Occupations • Geologists, Biological, Life, and Medical Scientists 	<ul style="list-style-type: none"> • Sales representatives: mining, manufacturing, and wholesale • Engineers: electrical and electronic • Truck drivers • Secretaries • Computer programmers • General office clerks

Differences In Specific County Occupation Growth Projections From The Overall Bay Area Region Projections (1997–2002) — (Cont'd.)

☐ Achievable By Those With High School Degree Or Less

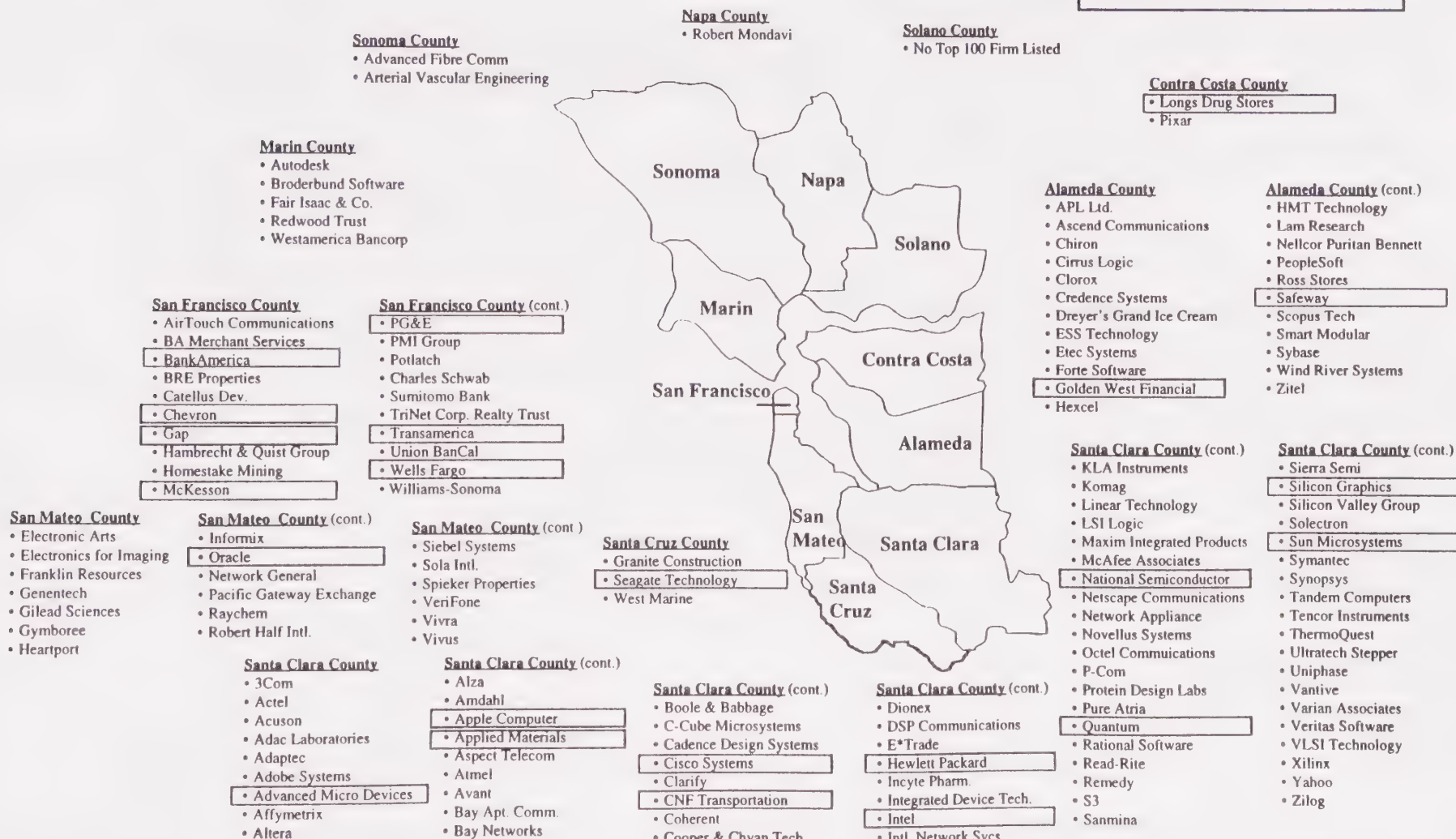
County	Top 25 Occupations "In Addition" To Regional List	Top 25 Occupations "Excluded From" The Regional List
San Mateo	<ul style="list-style-type: none"> • Investigators and adjustors except insurance • Managers marketing and public relations • Geologists, biologists, life and medical scientists 	<ul style="list-style-type: none"> • Janitors and cleaners • Cooks • Teachers, elementary school
Santa Clara	<ul style="list-style-type: none"> • Assemblers • Registered nurses • Managers, marketing, advertising, and public relations • Electrical and electronic technicians • Engineers 	<ul style="list-style-type: none"> • Teachers' aides • General office clerks • Machinery maintenance occupations • Health aides except nursing • Teachers, elementary school
Santa Cruz	<ul style="list-style-type: none"> • Stock and material handlers and baggers • Miscellaneous precision workers: metal, wood • Occupations not classified • Miscellaneous hand working production occupations • Maids, housekeepers, launderers • Nursing aides, orderlies and attendants • Miscellaneous machine operators 	<ul style="list-style-type: none"> • Executives, administrators, and officials public administration • Engineers: electrical and electronic • Receptionists • Computer programmers • Accountants and auditors • Financial managers • Teachers, elementary school
Solano	<ul style="list-style-type: none"> • Assemblers • Teachers, secondary school • Registered nurses • Correctional Institution officers • Packaging and filling machine operators • Miscellaneous hand working production occupations • Traffic shipping and receiving clerks • Teachers, special education • Mail carriers postal service 	<ul style="list-style-type: none"> • Computer systems analysts and scientists • Sales representatives: mining, manufacturing, and wholesale • Engineers: electrical and electronic • Guards, police, protective occupations except public services • Computer programmers • Sales support occupations • Accountants and auditors • Machinery maintenance occupations • Health aides except nursing
Sonoma	<ul style="list-style-type: none"> • Assemblers • Teachers, secondary school • Sales workers furniture, appliances, and building supplies • Managers medicine and health • Managers food serving and lodging establishments • Social workers 	<ul style="list-style-type: none"> • Engineers: electrical and electronic • Guards, police, protective occupations except public services • Computer programmers • Teachers' aides • Financial managers • Health aides except nursing

Source: Employment Development Department LMID; discounted annualized estimate based on projections from 1994–2001;
A.T. Kearney analysis

As counties consider how to partner with the business community, most can draw upon at least a handful of large employers. The principal exceptions being Solano and Napa

Top 150 Bay Area Employers By County⁽¹⁾

= Fortune 500 Company

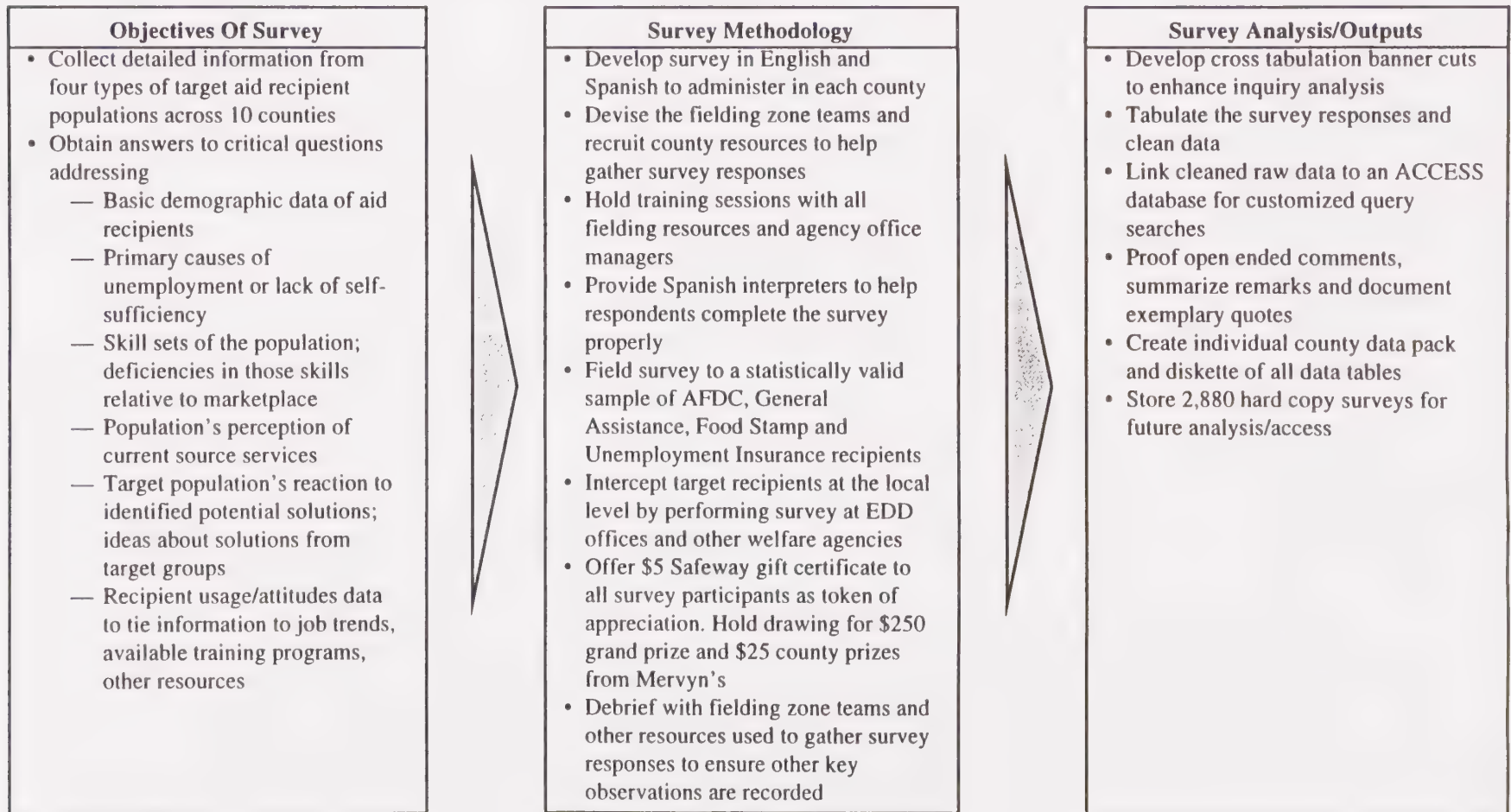


Notes: (1) Top 100 measured by market value 3/31/97
Source: San Francisco Chronicle, April 28, 1997

Barriers to Workforce Re-Entry

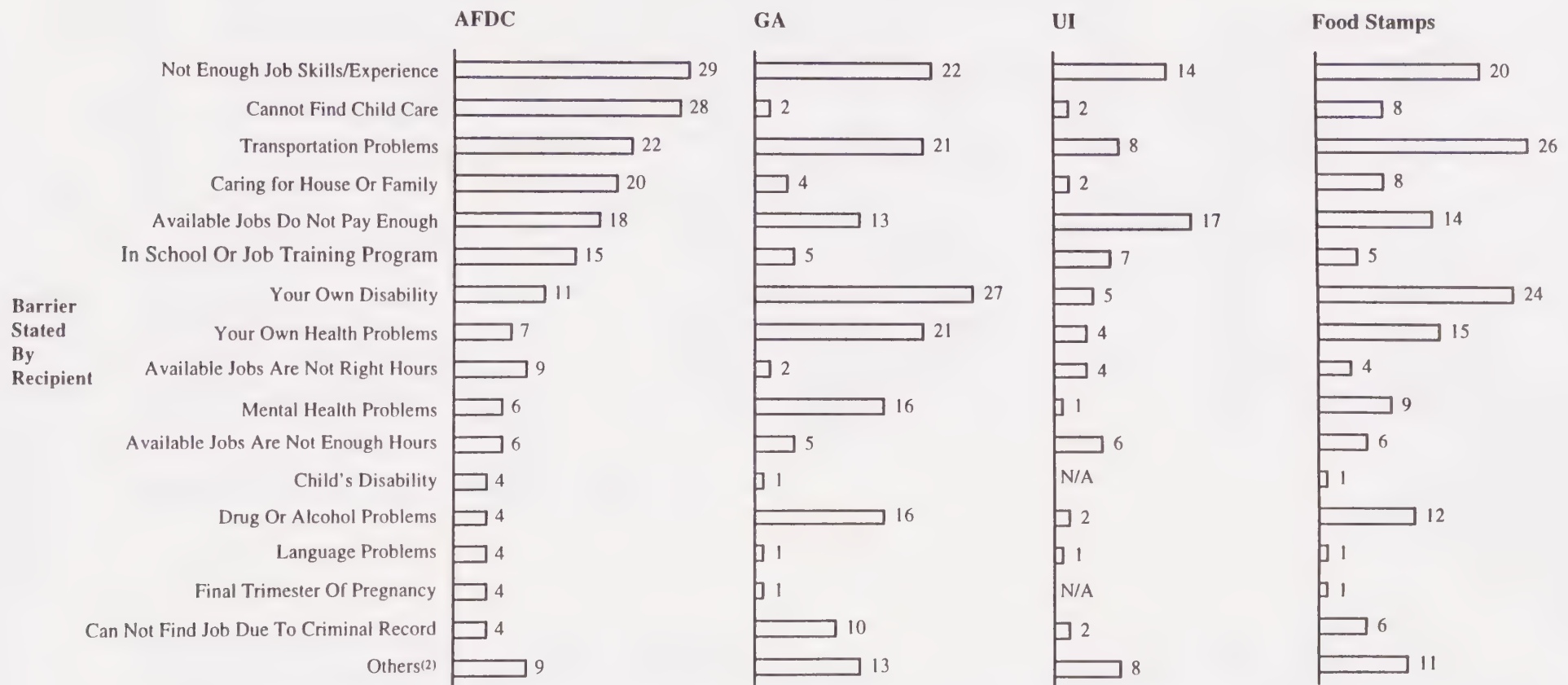
In order to understand what barriers current job seekers face we conducted the first survey of aid and unemployment recipients across all ten counties

Assessing Barriers To Workforce Re-Entry



Limited job skills and transportation problems are major barriers to employment for all aid recipients. Additionally, for AFDC recipients, caregiving responsibilities inhibit participation in the workforce. Similarly, General Assistance recipients are often coping with personal health issues which limit working abilities

Reasons For Not Being In Workforce By Aid Type⁽¹⁾ (% Responding)



Notes: (1) Reasons "unable to find job" and "just laid off or fired" were excluded due to overwhelming response

(2) Cumulative percentage of other mentioned reasons including: just released from prison, slack time, don't want to work, child's health problems, spouse/partner doesn't approve, and don't have work permit/green card

Source: Workforce Preparation survey; A.T. Kearney analysis

On a county by county basis the main barriers to employment are lack of job skills, transportation problems and the fact that available jobs do not pay enough

Top Three Barriers to Workforce Re-entry by County (% Responding⁽¹⁾)

Alameda	Contra Costa	Marin	Napa	San Francisco
1. Not enough job skills (24%) 2. Transportation problems (22%) 3. Cannot find child care (17%)	1. Not enough job skills (25%) 2. Transportation problems (22%) 3. Cannot find child care (12%)	1. Available jobs do not pay enough (14%) 2. Not enough job skills (14%) 3. a) Substance abuse (11%) b) In school/training (11%) c) Personal disability (11%)	1. Not enough job skills (19%) 2. In school/training (17%) 3. Transportation problems (17%)	1. Not enough job skills (23%) 2. Available jobs do not pay enough (18%) 3. Personal disability (17%)
San Mateo	Santa Clara	Santa Cruz	Solano	Sonoma
1. Not enough job skills (22%) 2. Available jobs do not pay enough (18%) 3. Transportation problems (14%)	1. Not enough job skills (32%) 2. Transportation problems (20%) 3. Cannot find child care (19%)	1. Your own disability (21%) 2. Available jobs do not pay enough (21%) 3. Not enough job skills (20%)	1. Transportation problems (23%) 2. Not enough job skills (19%) 3. Available jobs do not pay enough (16%)	1. Personal disability (24%) 2. Transportation problems (19%) 3. Not enough job skills (18%)

Note: (1) Excludes barrier "unable to find job" and "just laid off" due to overwhelming responses in these two categories
 Source: Workforce Preparation Survey; A.T. Kearney analysis

Yet, of all aid and unemployment insurance recipients in the Bay Area, 88% can be considered employable

Employable Bay Area Unemployment And Aid Recipients

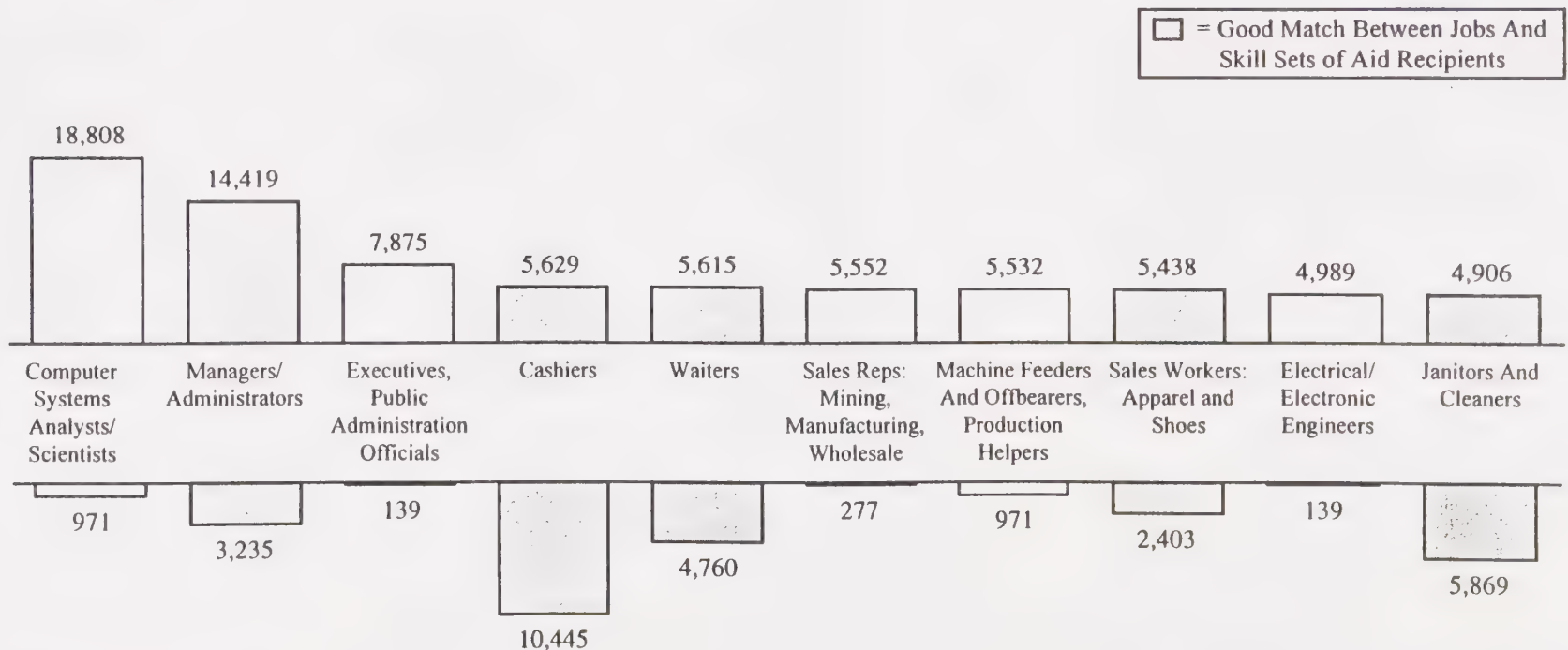
Bay Area	Employable AFDC Adult Recipients	Employable UI Recipients	Employable NAFS Adult Recipients	Employable General Assistance Recipients	Total Employable		Percentage Of Bay Area Total Employable Aid and Unemploy- ment Insurance Recipients
					Absolute Number	Percentage	
Alameda	25,606	14,994	28,075	3,904	72,579	87	26
Santa Clara	18,080	14,804	11,135	2,506	46,525	88	17
San Francisco	8,799	8,172	8,874	11,523	37,368	90	14
Contra Costa	10,247	9,610	5,005	1,575	26,437	84	10
Solano	6,638	4,938	2,584	520	14,680	90	5
Sonoma	4,210	4,570	3,777	123	12,680	87	5
San Mateo	2,740	5,379	3,189	648	11,956	89	4
Santa Cruz	2,128	6,027	2,505	8	10,668	88	4
Marin	917	1,910	1,647	86	4,560	87	2
Napa	787	1,377	1,150	11	3,325	87	1
Bay Area Total	80,152	71,781	67,941	20,904	240,778	88	100

**Total Bay Area
Unemployment And
Aid Recipients**

Source: State reported County Social Services data, County Social Services data, E.P.D.; UI Claims Activities Report;
A.T. Kearney analysis

Our analysis shows that significant job opportunities exist for a low-skilled workforce in multiple fast-growing occupations

Top 10 New Growth Jobs In Bay Area (1997–2002)
(Number of New Jobs)



Number of Aid Recipients with Job Experience
(Bay Area Total = 116,232)

Note: (1) Job experience extrapolated to aid/unemployment populations based on WPIT survey data
Source: Employment Development Department, LMID; Workforce Preparation Survey; A.T. Kearney analysis

Most counties appear to have a reasonable match between the number of new jobs requiring high school education or less and job seekers with low education levels. The exceptions are San Francisco and Solano

Match of Low-Education Jobs to Aid/Unemployment Job Seekers⁽¹⁾

County	New Jobs For High School Education Or Less ⁽²⁾	Low Education Job Seekers in Aid Population ⁽³⁾	Low Education Job (Shortage)/ Surplus
Alameda	15,571	13,032	2,539
Contra Costa	7,498	6,521	977
Marin	2,423	895	1,528
Napa	1,899	703	1,196
San Francisco	2,775	8,124	(5,439)
San Mateo	6,312	2,757	3,555
Santa Clara	18,485	10,120	8,365
Santa Cruz	3,703	2,654	1,049
Solano	2,193	3,555	(1,362)
Sonoma	4,007	2,657	1,350
BAY AREA	64,865	51,081	13,847

Observations
<ul style="list-style-type: none"> • Job shortages <ul style="list-style-type: none"> — San Francisco — Solano • Job surpluses <ul style="list-style-type: none"> — San Mateo — Santa Clara • Opportunities <ul style="list-style-type: none"> — Issue coordination between counties <ul style="list-style-type: none"> -- Transportation -- Housing issues -- Job notification -- Training — Communication among constituents <ul style="list-style-type: none"> -- Job seekers -- Employers -- Agencies

If even a portion of aid and unemployment recipients are to be employed, employers in every county must be heavily incented to hire them

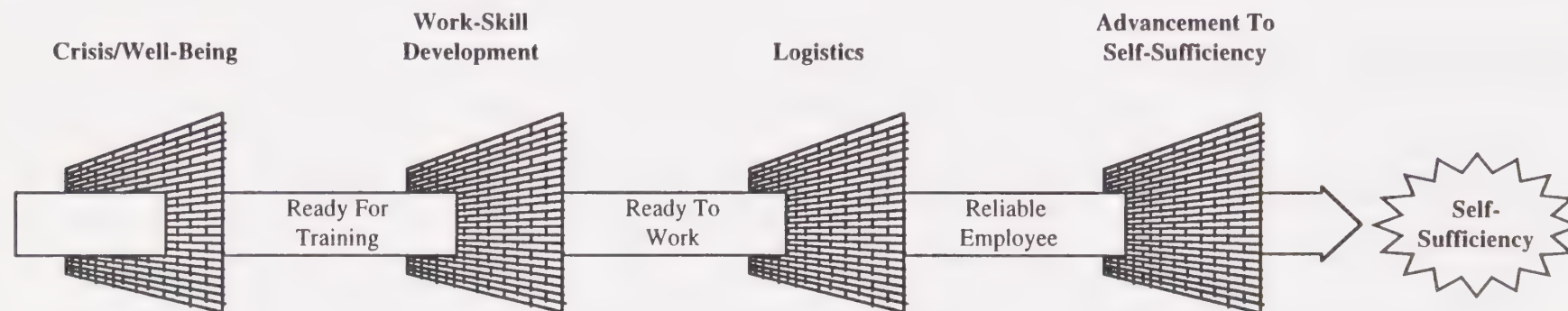
Notes: (1) Low education = high school diploma or less

(2) 1990 census; estimated by multiplying percentage of education level type by total number of available jobs in occupations

(3) County data and survey data; includes AFDC, GA, and Unemployment Insurance recipients (multiplied by education level percents); excludes any unemployed "Food Stamps Only" and non-quantifiable "other unemployed" individuals

Based on our analysis, we have created a four stage workforce re-entry framework that describes the wide variety of barriers to be addressed at each stage of re-entry into the workforce.

Stages Of Workforce Re-Entry



Barriers

- Substance abuse, homelessness, temporary disability
- Domestic abuse, child's health or behavioral problems
- Inadequate literacy/remedial skills
- No high school diploma/ GED
- No recent work experience
- Low self-esteem
- Undeveloped work habits
- Inadequate/unaffordable child care options
- Other dependent care issues
- Unreliable transportation options
- Expense of work wardrobe
- Inflexible work hours
- Trapped in low-wage job
- Unable to leave work for further education/training
- Continuing logistics issues

Applicable Resources

- Personal Health and Disability-related programs
- Children's Health and Disability-related programs
- Personal Health and Disability-related programs
- Children's Health and Disability-related programs
- Child/elder care services
- Work skills improvement/ educational training
- Job search
- Personal Health and Disability-related programs
- Children's Health and Disability-related programs
- Child/elder care services
- Work skills improvement/ educational training
- Job search
- Transportation
- Personal Health and Disability-related programs
- Children's Health and Disability-related programs
- Child/elder care services
- Work skills improvement/ educational training
- Job search
- Transportation

Survey participants' comments illustrate the re-entry barriers encountered along the path to self-sufficiency

Respondent Comments Regarding Re-Entry Stage Shortcomings

■ Crisis/Well-Being Stage

- “I am unable to work until I complete (drug) rehabilitation” — *San Francisco AFDC Recipient*
- “My son’s health makes it hard to find qualified child care. I can’t work full-time” — *Contra Costa AFDC Recipient*

■ Work-Skill Development Stage

- “I have a good education, but I need to become computer literate. All jobs seem to require knowledge of computers” — *Sonoma County GA Recipient*

■ Logistics Stage

- “Becoming employed for many is a major life change — I need help with all the things associated with getting and staying there” — *Alameda AFDC Recipient*
- “Before I can find work, I need a reliable car” — *San Mateo AFDC Recipient*
- “There should be community child care...based on income for people like me” — *Solano AFDC Recipient*

■ Advancement to Self-Sufficiency Stage

- “I need information about how to make a career move (by getting more) training and...how to support my family at the same time” — *San Francisco UI Recipient*
- “I need to earn at least \$10/hour, but I lack the skill for all but \$6/hour jobs” — *Contra Costa UI Recipient*
- “What’s needed are job training services to keep people employable and off aid” — *Napa Other Unemployed*

Today's Resource Deployment

While significant amounts of federal and state funding, as well as non-cash assistance and training programs exist, the deployment of resources today raises concerns and needs to be reviewed in light of our earlier analysis

Today's Resource Deployment

Issue
<ul style="list-style-type: none">• Most resource expenditures are focused on the first reentry stage (crisis/well being) instead of across all four stages• Each type of aid recipient has slightly different barriers to employment over and above the job research/skill deficiency issue struggles• Most county governments have limited experience in allocating targeted funds in a discretionary fashion for aid recipients• Available training programs are not in balance with most promising job growth areas• Recipients need both “hard” and “soft” skills to successfully progress through the reentry stages



Resource Areas
<ul style="list-style-type: none">• Cash<ul style="list-style-type: none">— Financial resources are designed to stabilize aid recipients on basic physical health, mental health, housing, and safety issues rather than transforming them into a state of self-sufficiency— Most financial resources are strictly directed by federal and state policies• Non-cash assistance<ul style="list-style-type: none">— Aid recipients do benefit from programs addressing their needs in food, transportation, counseling, and education, but participation rates could be higher in most program areas• Training programs<ul style="list-style-type: none">— While training programs are numerous, they often train for the fields with limited job openings— Complete listings of training programs are difficult for recipients to locate both within and across counties

Currently, about 90% of all resources are primarily dedicated to crisis/well-being programs; very little is allocated to sustaining employment

**Bay Area Resources
1997-98 Fiscal Year
(\$ Thousands)**

	Crisis/Well-Being	Work-Skill Development	Logistics	Advancement To Self-Sufficiency	
Public	<ul style="list-style-type: none"> • AFDC 787,856 • General Assistance 147,530 • NAFS 350,678 • Unemployment Insurance 559,313 • Medi-Cal <ul style="list-style-type: none"> — Administration 109,938 — Public assistance 953,846 — All others 792,623 • Emergency assistance 27,617 • Housing 48,250 • Mental/Disabled care 316,798 • Children's health 211,535 • Substance abuse 72,920 • Prevention/intervention 15,323 	<ul style="list-style-type: none"> • GAIN 61,682 • General Assistance vocational training 2,883 • Food stamp employment/training 3,652 • EDD Job Services 25,162 • JTPA 58,117 • Vocational Rehab. Services 3,851 • Cal-Learn 8,906 • Other employment services 39,113 	<ul style="list-style-type: none"> • Transportation 2,108 • Child care 26,586 • Elder care 86,027 	<ul style="list-style-type: none"> • Self-sufficiency support 1,576 	
	Subtotal 4,394,228	Subtotal 203,366	Subtotal 114,721	Subtotal 1,576	
Non-Profit⁽²⁾	<ul style="list-style-type: none"> • Community services 69,727 • Family support services 40,686 • Services for the needy 42,643 • Emergency assistance 1,326 • Housing 52,800 • Health/mental health 69,463 • Disabled care 174,100 • Substance abuse 77,191 • Prevention/intervention 27,959 • Nutrition assistance 4,753 	<ul style="list-style-type: none"> • Adult and general education 2,061 • Disabled training 67,231 • Vocational training 41,548 • Other work-skill development 2,587 	<ul style="list-style-type: none"> • Transportation 4,258 • Child care 69,535 • Elder care 35,144 	<ul style="list-style-type: none"> • Self sufficiency support 5,428 	
	Subtotal 560,648	Subtotal 113,427	Subtotal 108,937	Subtotal 5,428	
	TOTAL 4,954,875	TOTAL 316,793	TOTAL 223,658	TOTAL 7,004	
	Percent 90%	Percent 6%	Percent 4%	Percent 0%	

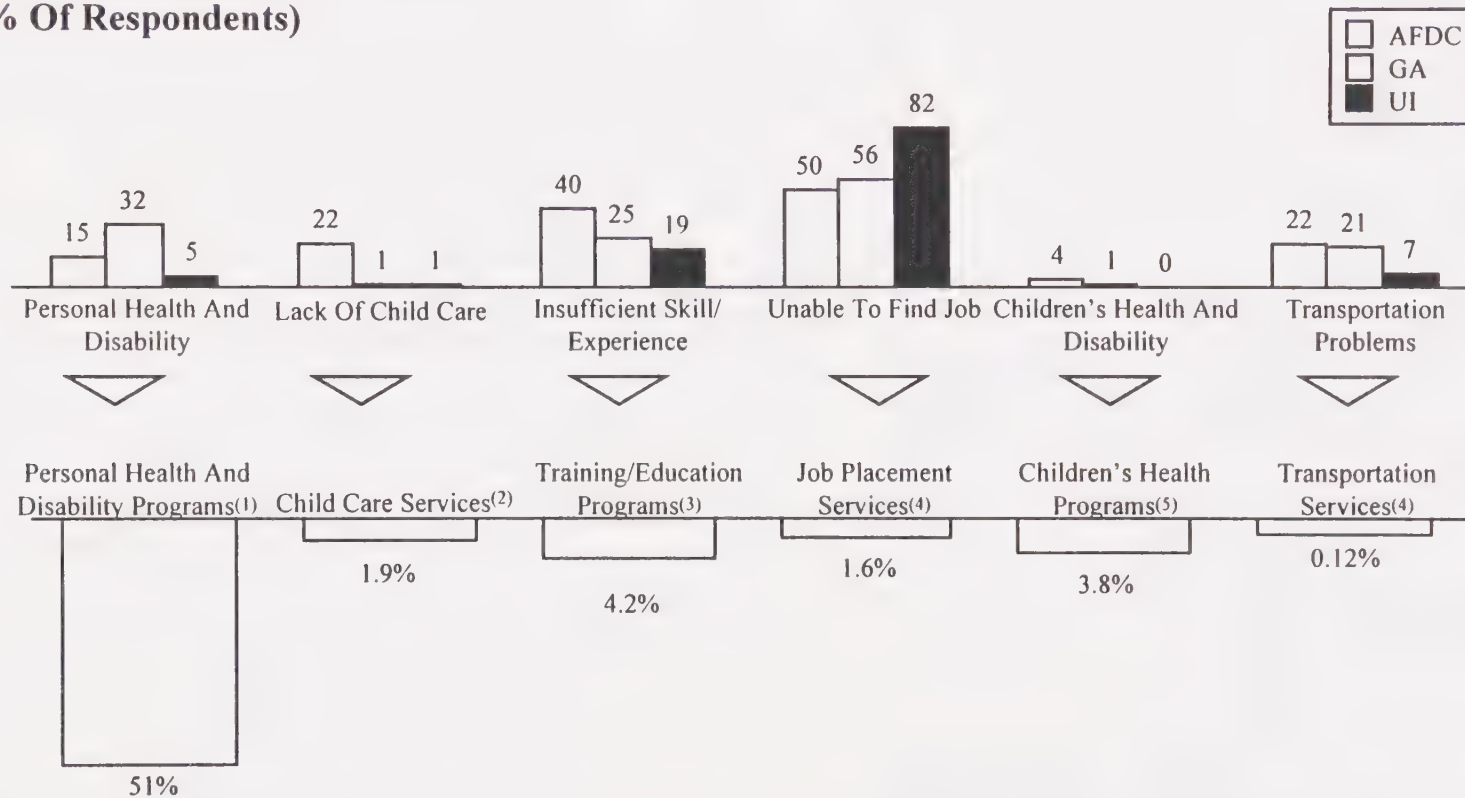


**Total Resources
\$5,502 million**

Source: County Budgets for FY 1996-1997, FY 1997-1998; USF Calif. Non-Profit database; NCCC Information & Referral Service; Volunteer Center of Sonoma; 1996-1997 Annual Public Welfare (California); EDD Coastal Division Job Services Div. Chief's Office; A.T. Kearney analysis

A mismatch clearly exists, particularly in addressing barriers related to job seeking (ability to find/skill level) and logistics (transportation/child care)

Primary Barriers To Employment (% Of Respondents)



Percentage Of County Resources Allocated To Addressing Barrier (Total = \$5,502 Million)

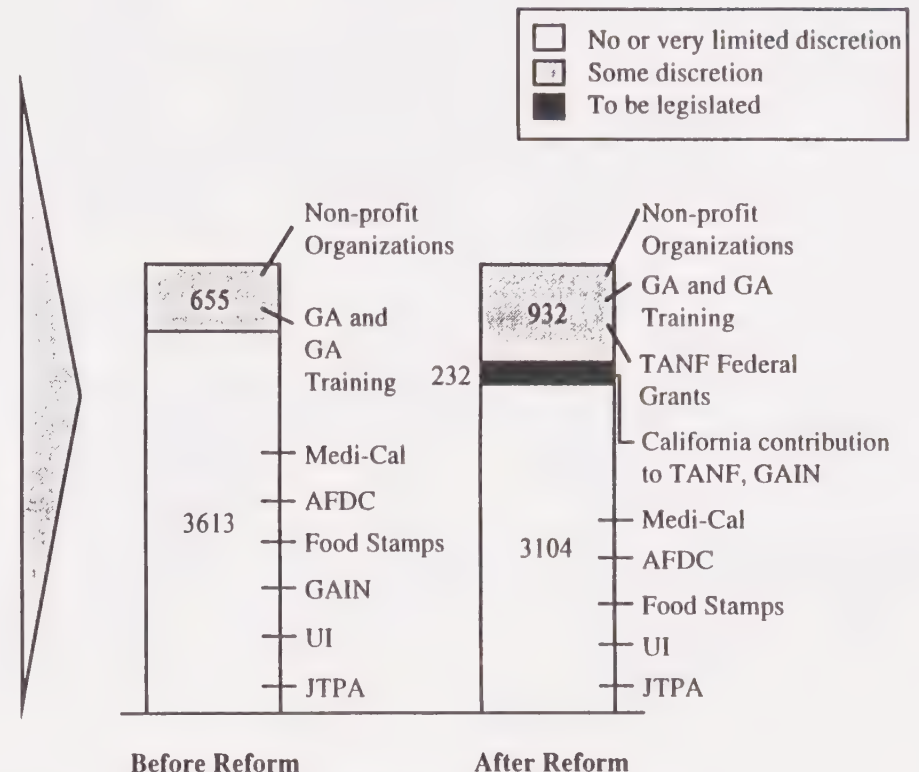
- Notes:
- (1) Includes: Disabled training, substance abuse, mental and physical healthcare
 - (2) Includes: Child care
 - (3) Includes: JTPA, Cal-Learn, vocational training, adult and general education non-scholarship aid
 - (4) Includes: GAIN, EDD
 - (5) Includes: Children's health and disability programs

Though federally imposed restrictions on how to deploy funding are being lifted with the onset of welfare reform, a relatively small proportion of total spending will become discretionary

Funding Changes From Welfare Reform

	Situation
Before Welfare Reform	<ul style="list-style-type: none"> • Most programs were state and/or federally mandated • Local governments had little or no flexibility in dispensing resources
Beginning 1997-98	<ul style="list-style-type: none"> • The federal government issues block grants to states for <ul style="list-style-type: none"> — TANF (formerly AFDC) and Food Stamps program based upon FY1995, a peak funding year — California (and other states) continue to match at least 80% of FY1994 AFDC spending — Counties will have more discretion in what programs are provided

Discretionary Spending (\$ Thousand)



Issues
<ul style="list-style-type: none"> • Counties have little history in creating innovative programs • Collaboration with community-based organizations is limited • State may still impose tight limits on the use of resources

Aid recipients participate mainly in food, transportation, individual counseling, and education-related programs. With the exception of Food Stamps, child care, and substance abuse counseling related services, the vast majority of non-cash aid assistance programs have had extremely low participation⁽¹⁾ even though the programs were deemed very important

Participation Rate In Non-Cash Aid Assistance Programs

☐ Significant Participation Rate

		% Of Survey Respondents	
		Very Important Service	Do Use Service
Classes	• College	77	16
	• On-the job training	77	13
	• Technical training	77	11
	• Vocational	77	11
	• Self improvement	77	10
	• High school	77	9
	• Parenting	77	9
	• GED	77	9
	• Other	77	4
	• Money management	77	4
Housing Assistance	• Homeless shelter	72	14
	• Subsidized low-income housing	72	11
	• Public housing	72	10
	• Other	72	5
	• Transitional housing	72	5
	• Battered women's shelter	72	3
Food Or Nutritional Assistance	• Food stamps	68	67
	• WIC	68	22
	• Food bank	68	15
	• Meal program	68	3
	• Other	68	3

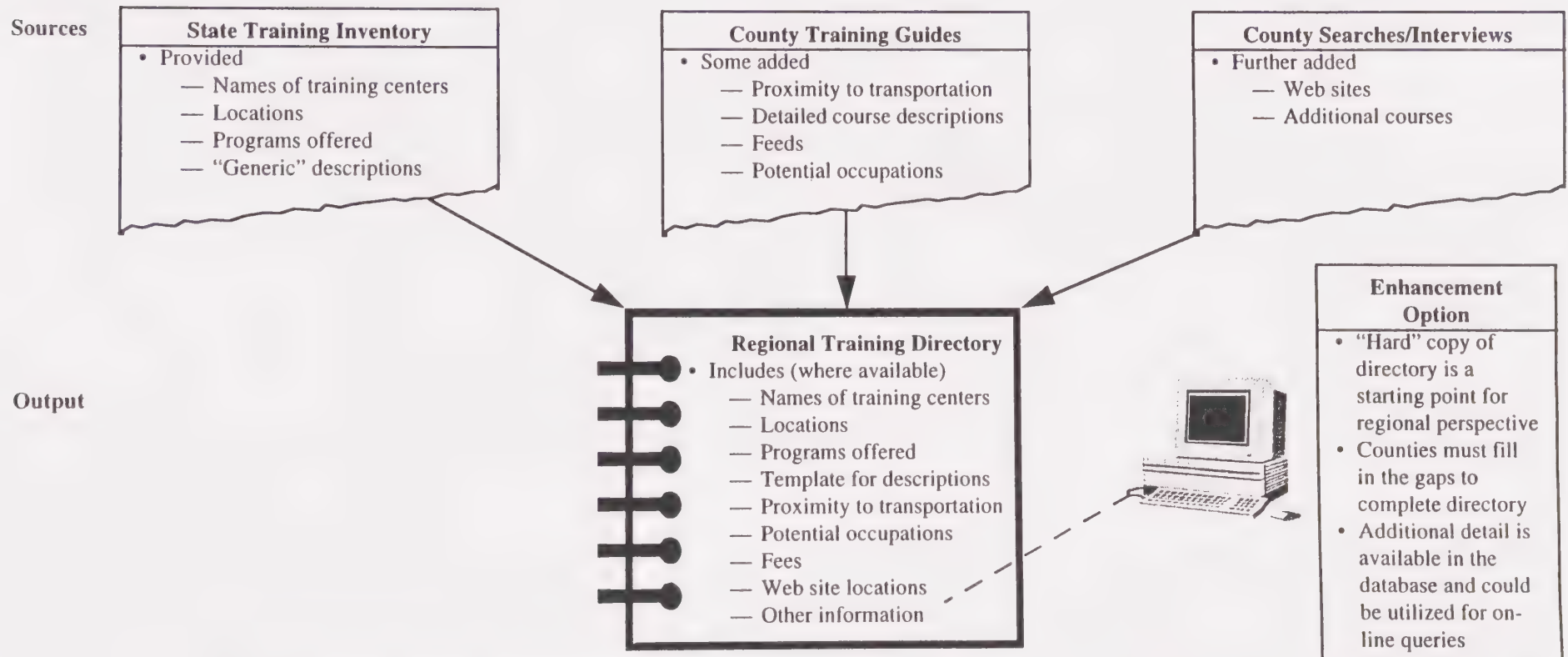
		% Of Survey Respondents	
		Very Important Service	Do Use Service
Counseling Or Mental Health Services	• Individual counseling	33	34
	• Support group	33	21
	• Group counseling	33	16
	• Residential program such as a group home	33	16
	• In-patient hospital treatment	33	6
	• Other	33	4
Drug Or Alcohol Treatment Services	• Support group	26	24
	• Group counseling	26	17
	• Individual counseling	26	16
	• Residential program such as a group home	26	12
	• In-patient hospital treatment	26	3
	• Other	26	3
Other Services	• Transportation	59	20
	• Child care	50	53
	• Personal services	NA	NA
	• Other	NA	NA
	• Immigration or refugee services	NA	NA

Note: (1) Chart does not include pure cash aid programs such as AFDC, GA, Unemployment Insurance; does not include Medi-Cal

Source: Workforce Preparation survey; A.T. Kearney analysis

Counties have sorely lacked comprehensive training information. As a result of our project, several sources were utilized to create a comprehensive regional training directory to assist counties in their efforts as well as support our analysis of the issues


Training Program Directory



A comprehensive regional training directory allows the counties providing services not only to direct their clients on focused searches, but enables them to provide a regional perspective

Furthermore, the range of programs offered by Bay Area training centers does not always align with those occupations growing in the counties

Mismatch Of Training Programs To Job Availability By County

 = Match

County	Top Five Training Programs With Minimal Prerequisites ⁽¹⁾	Number Of Programs
Alameda	<ul style="list-style-type: none"> General office clerks Computer operators, word processors, typists Bookkeepers, accounting and auditing clerks Secretaries Hairdressers, barbers, and cosmetologists 	39 37 32 29 22
Contra Costa	<ul style="list-style-type: none"> Secretaries Bookkeepers, accounting and auditing clerks Computer programmers General office clerks Computer operators, word processors, typists 	17 16 14 14 12
Marin	<ul style="list-style-type: none"> Computer operators, word processors, typists Groundskeepers and gardeners (except farm) General office clerks Religious workers Legal assistants 	10 5 4 4 3
Napa	<ul style="list-style-type: none"> General office clerks Computer operators, word processors, typists Hairdressers, barbers and cosmetologists Real estate sales occupations Groundskeepers and gardeners (except farm) 	4 3 3 3 3
San Francisco	<ul style="list-style-type: none"> Computer operators, word processors, typists General office clerks Computer programmers Bookkeepers, accounting and auditing clerks Secretaries 	35 33 24 19 19


Top Five Growth Occupations With Low Education Requirements ⁽²⁾
<ul style="list-style-type: none"> Waiters and waitresses Machine feeders and offbearers, production helpers, other laborers Truck drivers Janitors and cleaners Kitchen workers and miscellaneous food preparation occupations
<ul style="list-style-type: none"> Janitors and cleaners Waiters and waitresses Machine feeders and offbearers, production helpers, other laborers Cashiers Sales workers: apparel and shoes
<ul style="list-style-type: none"> Sales workers: apparel and shoes Waiters and waitresses Machine feeders and offbearers, production helpers, other laborers Kitchen workers and miscellaneous food preparation occupations Cashiers
<ul style="list-style-type: none"> Sales workers: apparel and shoes Waiters and waitresses Kitchen workers and miscellaneous food preparation occupations Cashiers Cooks
<ul style="list-style-type: none"> Janitors and cleaners Waiters and waitresses Guards, police, protective occupations except public service Cooks Cashiers

Note: (1) State Training Inventory and PIC County Training Guides

(2) Employment Development Department LMID; 1990 Census data, Low education = high school or less

Source: A.T. Kearney analysis

Mismatch Of Training Programs To Job Availability By County (Cont'd.)

 = Match

County	Top Five Training Programs with Minimal Prerequisites ⁽¹⁾	Number Of Programs
San Mateo	<ul style="list-style-type: none"> General office clerks Secretaries Bookkeepers, accounting and auditing clerks Nursing aides orderlies and attendants Computer operators, word processors, typists 	13 12 12 9 7
Santa Clara	<ul style="list-style-type: none"> Secretaries Bookkeepers, accounting and auditing clerks General office clerks Computer programmers Computer operators, word processors, typists 	33 31 26 26 24
Santa Cruz	<ul style="list-style-type: none"> Computer operators, word processors, typists Bookkeepers, accounting and auditing clerks Secretaries General office clerks Child care workers; public or private 	9 8 8 7 5
Solano	<ul style="list-style-type: none"> Computer operators, word processors, typists Secretaries Bookkeepers, accounting and auditing clerks Clinical laboratory technologists and technicians Receptionists 	10 10 7 5 5
Sonoma	<ul style="list-style-type: none"> Secretaries Computer operators, word processors, typists Bookkeepers, accounting and auditing clerks Receptionists Therapists (massage, acupuncture, etc.) 	16 13 10 8 6

Top Five Growth Occupations with Low Education Requirements ⁽²⁾
<ul style="list-style-type: none"> Machine feeders and offbearers, production helpers, other laborers Truck drivers Managers, administrators, and related occupations Computer systems analysts and scientists Waiters and waitresses
<ul style="list-style-type: none"> Janitors and cleaners Waiters and waitresses Computer systems analysts and scientists Machine feeders and offbearers, production helpers, other laborers Kitchen workers and miscellaneous food preparation occupations
<ul style="list-style-type: none"> Truck drivers General office clerks Machine feeders and offbearers, production helpers, other laborers Sales workers: apparel and shoes Kitchen workers and miscellaneous food preparation occupations
<ul style="list-style-type: none"> Waiters and waitresses Sales workers: apparel and shoes Kitchen workers and miscellaneous food preparation occupations Machine feeders and offbearers, production helpers, other laborers Cashiers
<ul style="list-style-type: none"> Sales workers: apparel and shoes Cashiers Machine feeders and offbearers, production helpers, other laborers Waiters and waitresses Kitchen workers and miscellaneous food preparation occupations

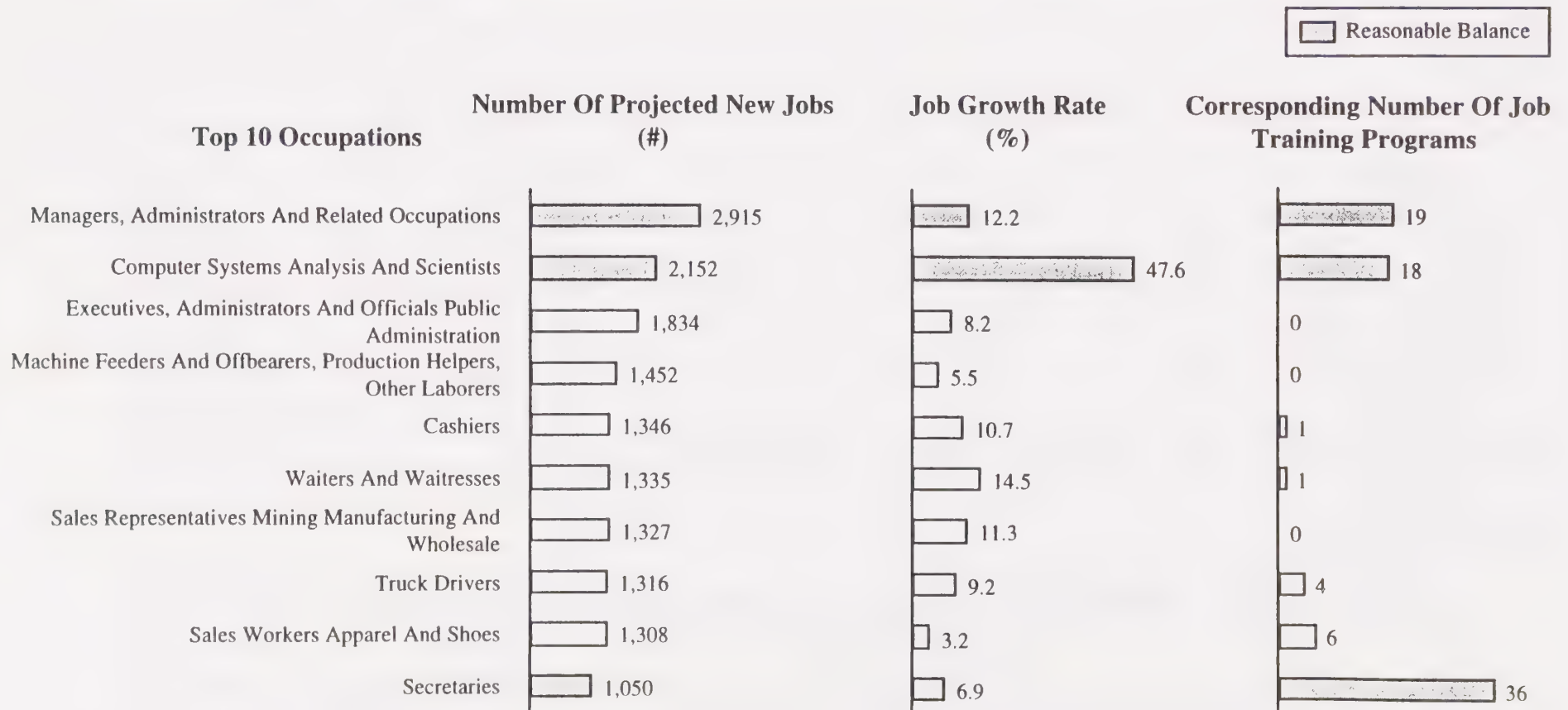
Note: (1) State Training Inventory and PIC County Training Guides

(2) Employment Development Department LMID; 1990 Census data, Low education = high school or less

Source: A.T. Kearney analysis

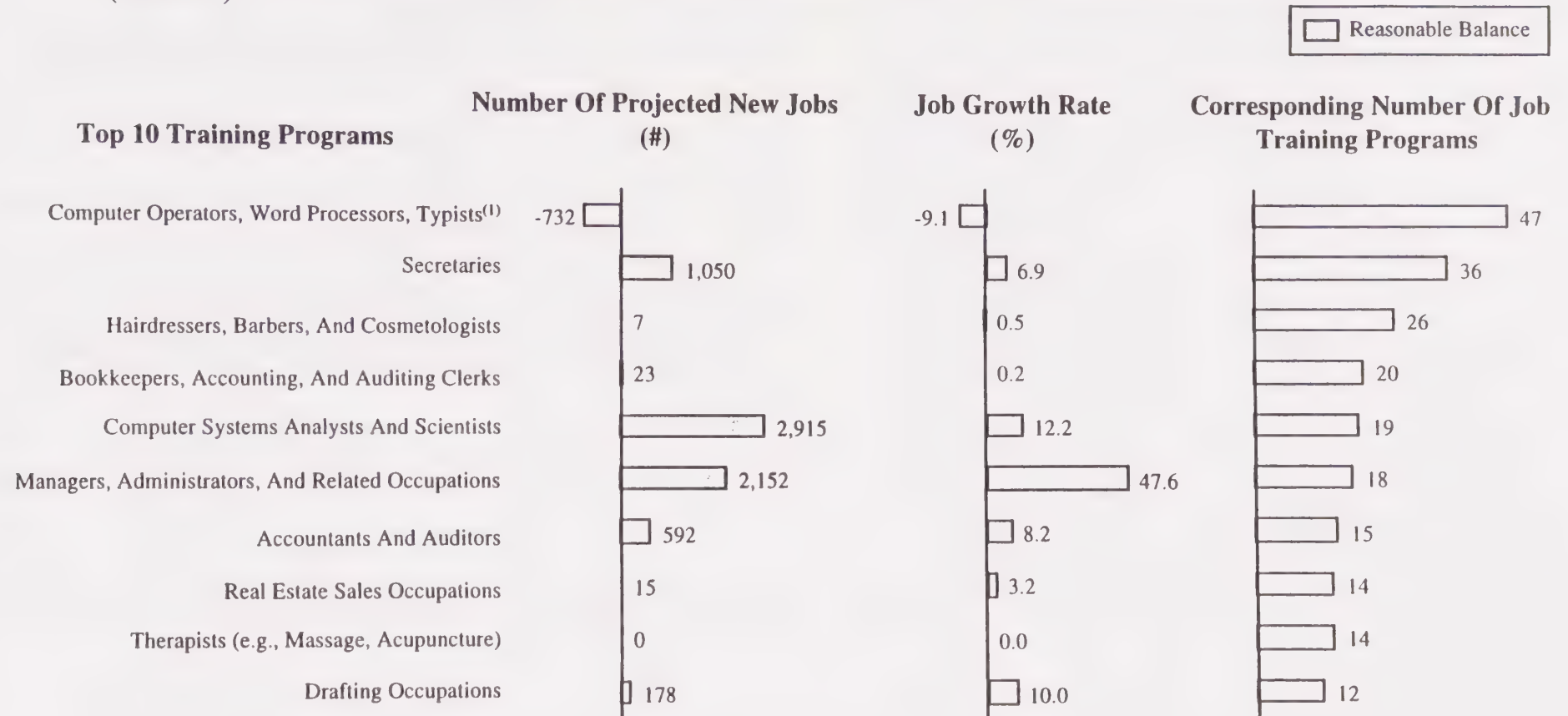
For example, in Alameda county, of the top 10 job occupations, only three categories appear somewhat balanced in the number of available training programs. Moreover, five categories have either one or no training programs at all.

Mismatch In The Number Of Training Programs For The Top 10 Occupations — Alameda County



Conversely, in Alameda county, the 10 most widely available training programs tend to prepare individuals for professions with little to no job openings

Mismatch In The Number Of Training Programs For The Top 10 Occupations — Alameda County (Cont'd.)



Alameda should rebalance its job training programs portfolio to better serve the needs of its employers and recipients

Note: (1) The worst absolute job growth occupation code of all (ranked 327 out of 327 job code types in Alameda)
Source: A.T. Kearney analysis

Soft skills are a necessary component of any comprehensive training program; however, the vast majority of programs focus on hard skills. While hard skills training programs often include a module on soft skills, their primary emphasis is on functional knowledge of the profession

Number of Hard Skills Versus Soft Skills Training Programs

Preliminary

County	Total Number Of Hard Skills Training Programs	Total Number Of Soft Skills Training Programs
Alameda	549	17
Contra Costa	408	30
Marin	89	9
Napa	84	5
San Francisco	423	17
San Mateo	122	8
Santa Clara	696	22
Santa Cruz	165	9
Solano	144	13
Sonoma	197	10
Bay Area Total	2,877	85

While much training is available to prepare people for certain skills, little is available to teach people how to be responsible employees

Hard skill programs include technical training for careers in computers, cosmetology, etc.

Soft skill programs include job readiness training for such things as résumé writing, interviewing, time management, job behavior, and attire

Moving Forward

There are a number of immediate steps that county leaders should undertake between now and December 1997 to begin addressing our findings for the benefit of the greater Bay Area community

■ **Immediate Steps By County**

■ **County Data Packs**

- Take the detailed project data packs compiled from the study and review in detail to assess the proper action items for your county

■ **Conclusions/actions required evaluation**

- Explore our conclusions discussed in today's meeting and determine if you agree with us

■ **Resources realignment**

- Appoint a champion to initiate financial resources realignment for both specified and discretionary funding to better serve the stages of re-entry and corresponding barriers experienced by aid recipients and unemployed

■ **Training program database**

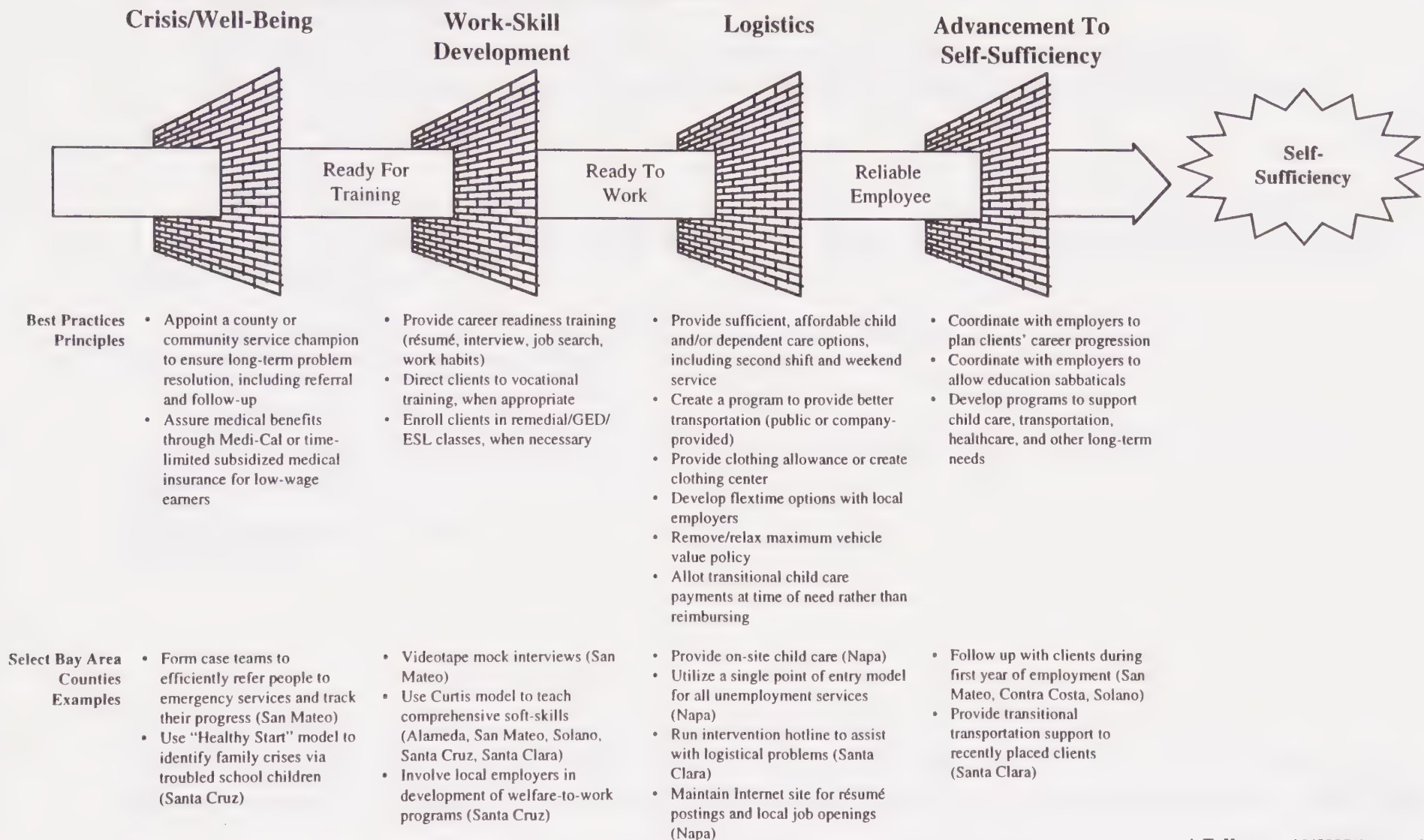
- Expand current information about available training programs and seek more balance in the overall offerings so that they reflect occupations in demand and necessary soft skills development

■ **Occupational opportunities communications**

- Assign responsibility for developing an ongoing communication program for aid recipients and unemployed about high growth occupations available across the ten county Bay Area and the corresponding training/hiring profile required

The discretionary funding that becomes available should be allocated in larger proportion to the stages of logistics and advancement; otherwise, the process breaks down and aid recipients regress on the continuum. Some pilots of best practices have been initiated in certain countries already

Stages Of Workforce Re-Entry — Best Practices






Annually each county should take the time to assess how well its current workforce preparation program mirrors the characteristics of successful programs. Feedback from the evaluation should be directed to appropriate county champions and leaders

Successful Program Characteristics Checklist	1997 County Review	
	On Track	Need Improvement
• Individual assessment: Assess the need of each client individually and assume that each wants to work		
• Accountability: Put clients to work as quickly as possible with stiff penalties for failing to make a serious effort		
• Work-first philosophy: Adopt an employment-oriented service model which builds client motivation and promotes self-esteem through work		
• One-stop shopping: Utilize a single point of entry model such that clients have multiple resources available to them at a single location		
• Life-skills training: Help clients learn to juggle work, education, and family		
• Soft-skills training: Emphasize basic job readiness skills such as business conduct, time management, conflict resolution, goal-setting, and problem solving		
• Enthusiastic caseworkers: Rely on motivated, dedicated caseworkers who will go out of their way to remove the barriers which prevent their clients from achieving self-sufficiency		
• Quantifiable achievements: Measure success by counting the number of recipients who get jobs		
• Employer involvement: Form strong links with local employers and work hard to maintain them		
• Strong relationships: Combine resources with other public and private organizations in order to deliver a comprehensive solution		
• Ongoing communications: Develop formal mechanisms for sharing information with all service providers		

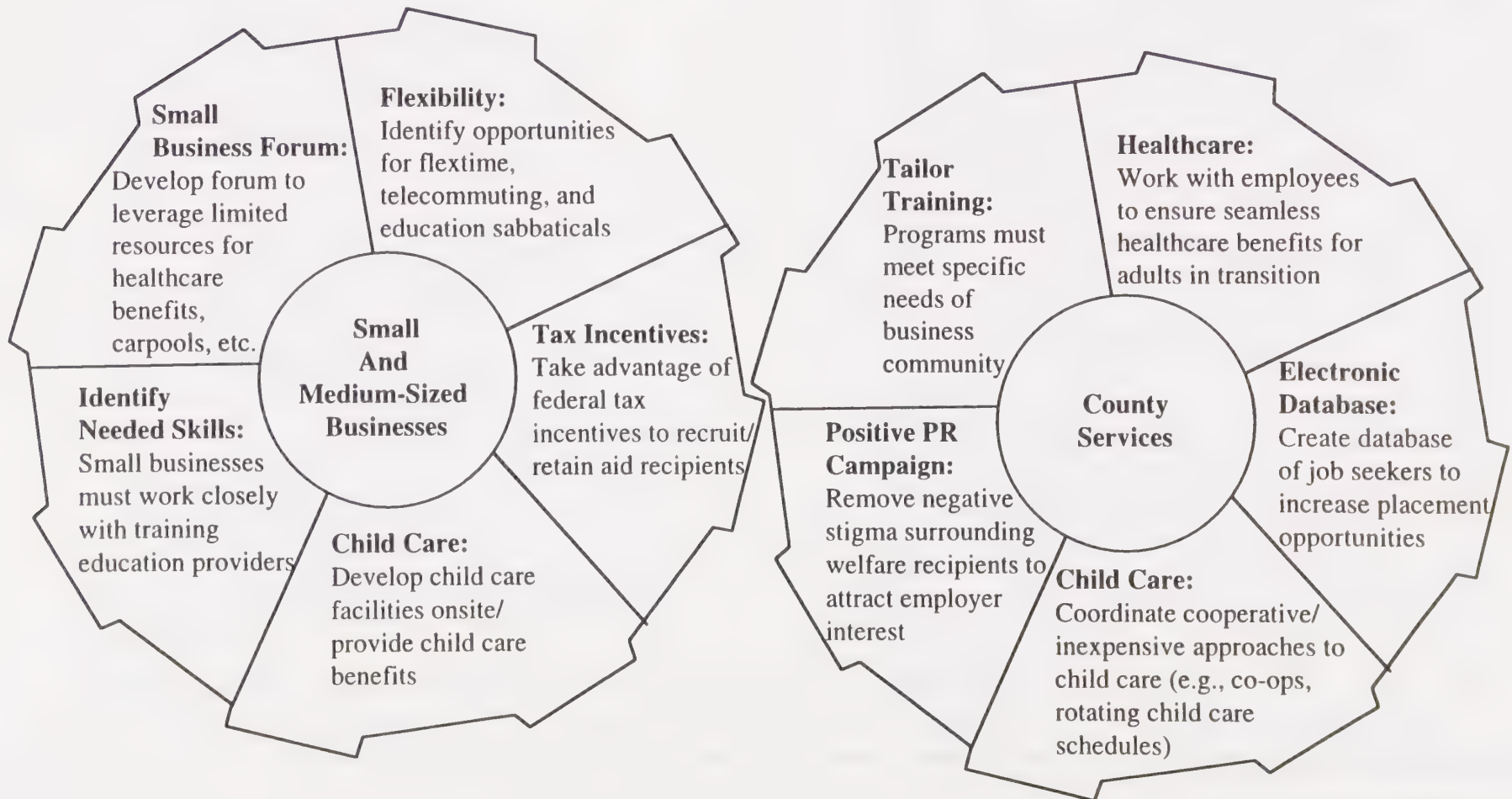
County services need to communicate and collaborate at every level in their organizations in order to identify areas for improvement and leverage each others' successes

Cross-County Organizational Level Integration

Organizational Level	Sample Constituencies	Opportunities
High 	<ul style="list-style-type: none"> • CAO, County Manager • Directors of Social Services • Public Works Director • Health Services Director 	<ul style="list-style-type: none"> • Create guides on how to replicate best-practices in their counties • Establish small 2–3 county strategy sessions to leverage opportunities between counties (e.g., job availability, worker transportation) • Hold retreats together to brainstorm and reflect on progress
Medium 	<ul style="list-style-type: none"> • GAIN/JTPA program coordinators • Local community leaders • Community organization directors • Intake/program managers 	<ul style="list-style-type: none"> • Standardize naming conventions in order for people to identify their counterparts in other counties • Create forums at which county workers can meet their counterparts in other counties to discuss methodologies • Establish standard methods for tracking program effectiveness and measuring success
Low 	<ul style="list-style-type: none"> • Caseworkers • GAIN program trainers • EDD employees • Family counselors • Child care providers • Healthcare workers 	<ul style="list-style-type: none"> • Create electronic bulletin board for front-line workers to exchange information and share success stories • Document best practices and create a formal mechanism for feeding information up to senior management

If time and resources are available, each county should tap into small and medium-sized business because they hire the majority of people coming off of aid. Increased coordination between local business and county service providers is critical to creating job opportunities and breaking down the barriers confronted on the path to self-sufficiency

Development Of Tightly Coordinated Efforts



As we conclude our presentation today, we would like to pay tribute to the many individuals who provided significant support to A.T. Kearney's analysis of workforce preparation issues

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Appendix

Attachment 1 — Calculation Of Low Education Job Seekers

Estimated Number Of Aid/Unemployment Recipients Joining The Workforce 1997–2002

County	AFDC(1)	GA(2)	UI(3)
Alameda	9,898	1,952	14,244
Contra Costa	4,010	788	9,130
Marin	335	6	1,815
Napa	291	43	1,308
San Francisco	2,458	5,762	7,763
San Mateo	1,003	324	5,110
Santa Clara	6,253	1,253	14,064
Santa Cruz	807	4	5,726
Solano	2,507	260	4,691
Sonoma	1,533	62	4,342
Total	29,095	10,454	68,193

X

AFDC(4)	GA (4)	UI (4)
66%	63%	37%

=

AFDC	GA	UI	Total
6,532	1,230	5,270	13,032
2,687	496	3,378	6,521
221	3	671	895
192	27	484	703
1,622	3,630	3,872	8,124
662	204	1,891	2,757
41,275	789	5,204	10,120
33	3	2,118	2,654
1,655	164	1,736	3,555
1,012	39	1,606	2,657
19,203	6,585	25,230	51,018

Looking for work

X % with low education⁽⁵⁾

=

of low educated job seekers

And of those that are employable, approximately 108,000 will need to re-enter the workforce by the year 2002; 51,000 of those aid/unemployment recipients have a low education

- Notes: (1) Based on employable AFDC population and percentage working mandates for the year 2002
 (2) Based on employable GA populations, assumed to join workforce at 50% rate
 (3) Assumed to be 100% employable, looking for work at 95% rate
 (4) Extrapolated to population from workforce preparation survey data
 (5) Low education = high school diploma or less

Source: State reported County Social Services data, County Social Services data, E.P.D.; UI Claims Activities Report; A.T. Kearney analysis

Attachment 2 — County-Specific Top 25 Growth Occupations

Detailed County Occupation Growth Projections (1997–2002) — San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma, (Cont'd.)

☐ Achievable By Those With High School Degree Or Less

	San Mateo		Santa Clara		Santa Cruz		Solano		Sonoma	
Top 25 Growth Occupations, 1997–2002	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)
Computer Systems Analysts And Scientists	4,818	66.6	25,589	37.2	1,298	53.8			629	28.9
Managers, Administrators, And Related Occupations	12,142	17.7	46,369	9.0	2,968	21.2	3,092	19.9	3,617	18.9
Executives, Administrators, And Related Occupations	11,054	7.6	30,525	7.3			3,180	5.4	5,910	7.3
Cashiers	5,119	7.9	14,793	8.1	2,270	13.6	2,853	9.6	4,724	10.9
Waiters And Waitresses	5,631	6.2	12,885	12.3	2,148	8.0	2,257	11.9	2,404	10.9
Sales Representatives: Mining, Manufacturing, And Wholesale	6,760	14.5	17,841	10.5	1,248	24.0			2,246	11.0
Machine Feeders And Offbearers, Production Helpers, Other Laborers	11,041	6.8	25,509	4.7	3,826	9.0	4,204	5.4	4,068	9.7
Sales Workers: Apparel And Shoes	19,476	1.2	43,572	1.8	7,072	5.5	9,857	3.6	12,618	4.7
Engineers: Electrical And Electronic	1,515	25.8	20,689	15.5						
Janitors And Cleaners			13,287	13.8	1,498	7.0	1,334	7.2	2,427	6.3
Truck Drivers	5,508	10.8	10,954	9.7	1,737	22.3	2,182	9.2	2,698	7.1
Receptionists	3,438	14.5	8,966	14.2			920	23.6	1,831	11.0
Secretaries	8,078	7.2	21,996	5.6	1,979	10.4	2,029	6.9	3,562	7.0
Guards, Police, Protective Occupations Except Public Services	1,965	13.9	8,811	17.3	762	27.4				
Computer Programmers	3,352	32.6	11,353	18.0						
Kitchen Workers And Miscellaneous Food Preparation Occupations	10,614	2.3	23,984	4.0	4,168	6.1	4,605	4.5	5,105	4.8
Teachers' Aides	3,221	12.5			1,567	11.2	2,394	15.1		
General Office Clerks	9,082	4.4			4,927	13.3	2,635	3.6	4,314	5.4
Sales Support Occupations	1,710	17.5	7,138	12.3	606	23.5			774	30.0
Accountants And Auditors	2,891	9.6	9,079	9.8					1,470	10.6
Cooks			9,312	7.1	1,717	9.2	1,741	7.2	2,483	7.4
Machinery Maintenance Occupations	3,493	7.7			1,014	12.4			1,816	10.4
Financial Managers	2,714	12.4	7,316	10.8			673	14.6		
Health Aides Except Nursing	885	31.5			782	43.5				
Teachers, Elementary School							2,696	20.5	1,877	19.2

Source: Employment Development Department LMID; discounted annualized estimate based on projections from 1994–2001;
A.T. Kearney analysis

Attachment 2 — County-Specific Top 25 Growth Occupations

Detailed County Occupation Growth Projections (1997–2002) — Alameda, Contra Costa, Marin, Napa, San Francisco (Cont'd.)

☐ Achievable By Those With High School Degree Or Less

	Alameda		Contra Costa		Marin		Napa		San Francisco	
Top 25 Growth Occupations, 1997–2002	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)
Assemblers	4,826	15.4								
Teachers Secondary School	4,927	12.1	4,431	6.8						
Police Detectives, Bailiffs And Other Law Enforcement Public Service	4,418	11.5								
Physical Education Teachers			1,363	30.8						
Sales Counter Clerks			1,176	35.5	592	16.7				
Registered Nurses			4,640	7.6						
Attendants Amusement And Recreation Facilities			972	35.6						
Stock And Material Handlers And Baggers			3,575	8.9			400	18.8		
Sales Workers Furniture, Appliances, And Building Supplies					9,576	1.3	3,897	2.5		
Miscellaneous Precision Workers; Metal, Wood					795	15.2				
Correctional Institution Officers					687	15.4				
Hairdressers, Barbers And Cosmetologists					447	20.8				
Occupations Not Classified							406	110.1		
Hand Packers And Packagers							615	18.7		
Separating, Filtering, And Clarifying Machine Operators							307	24.1		
Packaging And Filling Machine Operators							319	20.4		
Managers Medicine And Health							331	18.4		
Farmers And Farm Workers Except Horticulture							895	5.9		
Securities And Financial Services Sales Occupations									3,668	10.7
Investigators And Adjusters Except Insurance									4,905	5.8
Managers Food Serving And Lodging Establishments									2,064	13.3

Source: Employment Development Department LMID; discounted annualized estimate based on projections from 1994–2001;
A.T. Kearney analysis

A.T. Kearney 19/5887/\$mm 63

Attachment 2 — County-Specific Top 25 Growth Occupations

Detailed County Occupation Growth Projections (1997–2002) — Alameda, Contra Costa, Marin, Napa, San Francisco (Cont'd.)

☐ Achievable By Those With High School Degree Or Less

	Alameda		Contra Costa		Marin		Napa		San Francisco	
Top 25 Growth Occupations, 1997–2002	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)
Managers Marketing Advertising And Public Relations									3,153	6.9
Miscellaneous Hand Working Production Occupations									1,774	10.5
Geologists, Biological, Life, And Medical Scientists									1,767	10.2
Electrical And Electronic Technicians										
Engineers										
Maids, Housekeepers, Launderers										
Nursing Aides, Orderlies, And Attendants										
Miscellaneous Machine Operators										
Traffic Shipping And Receiving Clerks										
Teachers Special Education										
Mail Carriers Postal Service										
Social Workers										
All Other Occupations	493,084		234,901		70,678		37,708		450,021	
Total	794,963	6.6	383,225	6.5	132,069	6.2	66,092	8.3	657,000	1.7

Attachment 2 — County-Specific Top 25 Growth Occupations

At the county level a strikingly similar pattern of top growth occupations exists; however, differences do exist, particularly in the agrarian industry-oriented counties of Napa, Santa Cruz, Solano, and Sonoma

Detailed County Occupation Growth Projections (1997–2002)

(Alameda, Contra Costa, Marin, Napa, San Francisco)

☐ Achievable By Those With High School Degree Or Less

	Alameda		Contra Costa		Marin		Napa		San Francisco	
Top 25 Growth Occupations, 1997–2002	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)
Computer Systems Analysts And Scientists	14,519	47.6	2,544	41.0	841	46.2			5,183	30.2
Managers, Administrators, And Related Occupations	23,959	12.2	9,330	15.8	3,369	18.3	1,823	14.1	18,593	4.8
Executives, Administrators, And Related Occupations	22,459	8.2	11,379	7.9	4,510	7.5	1,828	10.5	20,147	3.0
Cashiers	12,554	10.7	8,362	9.0	2,250	9.5	1,265	14.0	9,427	4.7
Waiters And Waitresses	19,207	14.5	3,891	13.3	2,624	11.4	1,308	16.2	8,315	7.3
Sales Representatives: Mining, Manufacturing, And Wholesale	11,779	11.3	4,092	8.9	1,526	10.2	526	20.3		
Machine Feeders And Offbearers, Production Helpers, Other Laborers	26,577	5.5	8,978	6.7	2,645	10.4	1,590	5.1	10,020	2.1
Sales Workers: Apparel And Shoes	40,764	3.2	23,702	2.7	9,372	5.5	3,806	10.0	33,894	0.7
Engineers: Electrical And Electronic	2,707	26.6								
Janitors And Cleaners	11,210	7.4	4,857	14.4			748	10.4	11,723	6.9
Truck Drivers	14,286	9.2	4,856	8.7	1,644	5.8	495	15.2		
Receptionists	6,253	12.1	3,726	14.8	1,414	9.4	441	12.7	6,166	8.3
Secretaries	15,277	6.9	7,384	7.3	3,132	5.1	1,247	10.4		
Guards, Police, Protective Occupations Except Public Service	6,309	11.0	2,462	22.7					7,045	10.7
Computer Programmers					873	11.1				
Kitchen Workers And Miscellaneous Food Preparation Occupations	20,174	4.9	8,505	4.3	4,909	3.1	2,295	6.3	15,844	1.2
Teachers' Aides	7,261	12.7	5,000	9.3	1,513	9.8			5,128	7.2
General Office Clerks	21,944	4.0	8,927	4.4	3,069	3.3	1,116	9.0		
Sales Support Occupations	3,910	13.9	2,041	19.4	708	17.9			3,965	5.5
Accountants And Auditors	7,204	8.2			1,172	9.0			8,187	3.0
Cooks	6,808	8.9	3,830	7.9	1,983	5.5	804	12.6	6,941	5.0
Machinery Maintenance Occupations	7,632	9.7	3,870	10.2	1,152	9.7	663	15.5	4,656	4.7
Financial Managers	4,915	12.5							5,647	7.4
Health Aides Except Nursing					588	15.6	469	12.6	2,401	16.4
Teachers, Elementary School			4,431	6.8			790	2.8	5,466	3.3

Sources: Employment Development Department LMID; discounted annualized estimate based on projections from 1994–2001;
A.T. Kearney analysis

Attachment 2 — County-Specific Top 25 Growth Occupations

Detailed County Occupation Growth Projections (1997–2002) — San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma (Cont'd.)

☐ Achievable By Those With High School Degree Or Less

	San Mateo		Santa Clara		Santa Cruz		Solano		Sonoma	
	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)
Top 25 Growth Occupations, 1997–2002										
Assemblers			7,958	9.4			609	14.9	2,272	10.5
Teachers Secondary School							948	17.7	1,765	15.4
Police Detectives, Bailiffs, And Other Law Enforcement Public Service										
Physical Education Teachers										
Sales Counter Clerks										
Registered Nurses			12,694	6.4			1,502	12.5		
Attendants Amusement And Recreation Facilities										
Stock And Material Handlers And Baggers					1,028	10.1				
Sales Workers Furniture, Appliances, And Building Supplies									13,075	1.2
Miscellaneous Precision Workers; Metal, Wood					741	13.5				
Correctional Institution Officers							1,171	23.9		
Hairdressers, Barbers, And Cosmetologists										
Occupations Not Classified					522	99.6				
Hand Packers And Packagers										
Separating, Filtering, And Clarifying Machine Operators										
Packaging And Filling Machine Operators							306	31.1		
Managers Medicine And Health									960	56.7
Farmers And Farm Workers Except Horticulture										
Securities And Financial Services Sales Occupations										
Investigators And Adjusters Except Insurance	2,137	13.9								
Managers Food Serving And Lodging Establishments									607	21.7

Sources: Employment Development Department LMID; discounted annualized estimate based on projections from 1994–2001;
A.T. Kearney analysis

Attachment 2 — County-Specific Top 25 Growth Occupations

Detailed County Occupation Growth Projections (1997–2002) — San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma (Cont'd.)

☐ Achievable By Those With High School Degree Or Less

	San Mateo		Santa Clara		Santa Cruz		Solano		Sonoma	
Top 25 Growth Occupations, 1997–2002	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)	1997 Jobs (#)	Growth Rate (%)
Managers Marketing Advertising And Public Relations	2,191	17.2	8,315	9.2						
Miscellaneous Hand Working Production Occupations					290	43.4	596	16.6		
Geologists, Biological, Life, And Medical Scientists	1,924	21.2								
Electrical And Electronic Technicians			12,918	9.4						
Engineers			6,816	16.5						
Maids, Housekeepers, Launderers					1,696	4.5				
Nursing Aides, Orderlies, And Attendants					757	16.5				
Miscellaneous Machine Operators					703	13.2				
Traffic Shipping And Receiving Clerks							552	51.6		
Teachers Special Education							532	18.7		
Mail Carriers Postal Service							357	26.3		
Social Workers									1,307	14.0
All Other Occupations	247,506		640,600		73,196		80,051		120,122	
Total	388,265	7.0	1,059,269	6.8	120,520	10.6	133,276	5.6	204,681	6.5

Sources: Employment Development Department LMID; discounted annualized estimate based on projections from 1994–2001;
A.T. Kearney analysis

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